

THE INSTITUTIONAL AND DEVELOPMENTAL IMPACT OF CASH GRANTS: IS SOUTH AFRICA TRANSFORMING SOCIAL POLICY? PREPARED FOR THE FINANCIAL AND FISCAL COMMISSION

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1. INTRODUCTION

Central to overall transformation² of society is the question of how to ensure that South Africans begin to transcend their differences, develop a shared identity and work together to achieve the common objectives of eradicating poverty and addressing social inequality within a human rights based Constitution. What is the role and place of social assistance (primarily in the form of cash grants) and social policy in broader processes of transformation and change in South Africa? Making human rights a reality for the millions of historically disenfranchised people is part of a transformative social policy agenda. Can social assistance in the form of cash grants lay claim to being part of a broader social policy transformation agenda? To answer this question the paper reviews the conceptual roots of social assistance, some policy shifts in how social assistance links to social protection and its institutional and developmental impacts in South Africa. The philosophical traditions of social security and its historic role are more consistent with an approach that is reactive to market liberalism, piecemeal and residual (Pierson, 2006) rather than transformative and emancipatory for workers in the formal and unregulated sectors of the economy and poor people generally (Taylor, 2008).

Twenty years into South Africa's democracy, is there a shift from providing social grants as part of a residual social policy approach to alleviating poverty and temporary hardship to an approach designed to eradicate poverty and reduce inequality through a comprehensive social protection system? Government cash grants targeted to the destitute and poor, are part of a broader programme of social assistance (health, education, social welfare services, housing and access to basic services). Social grants as instruments of social assistance and social protection have underlying values and beliefs that inform the choices made by decision makers on whose needs matter and under what conditions (Taylor,

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² Transformation in this context is understood as a continuous process of institutional and systemic changes that result in social and economic inclusion of the majority through meeting the basic needs of South Africans, through changes in power relations, through changes in structures of ownership and control and the democratisation of society. It includes processes that move away from privileging people on the basis of race, to addressing gender, spatial, class or social and economic inequalities and also discriminatory practices on the basis of religion and ethnicity.

2007). This review of the institutional³ and developmental⁴ impact of cash grants takes as a starting point that such provision, at a policy level, is part of a social protection system that has the potential to address structurally based poverty and inequality. As part of a broader social protection system cash grants reflect a policy shift from an *ad hoc*, short term emergency welfare response to deprivations to a response designed as a part of a comprehensive package of measures to eradicate poverty and reduce inequality. The paper focuses on policy shifts with regard to social assistance and the role of social grants (as part of social assistance) within a comprehensive social protection framework. The institutional and developmental impacts of social grants are an important focus in the paper. By locating social grants within a comprehensive approach to social protection the paper argues that social grants have the potential to become part of a wider process of social transformation. Indeed this review highlights that there are multiplier effects of social grants that go well beyond the intended social welfare policy outcomes of addressing income poverty. Yet despite the extensive reach of social grants there remains a huge gap in provision which leave adults in the age cohort 18 to 59 years and who are not in employment and without unemployment benefits outside of the social protection net without income support.

2. CONCEPTUAL ROOTS OF SOCIAL ASSISTANCE AND CASH GRANTS: FROM RESIDUALISM TO CONSTITUTIONAL RIGHTS AND ENTITLEMENTS

The roots of South Africa's social grants system are part of social security arrangements that go back to the early days of industrialisation and mine workers struggles in the 1920s (Seekings, 2002). Internationally social security gained formal recognition in 1944 when the International Labour Conference saw it as the (right of a) "basic income to all in need of such protection and comprehensive medical care" (International Labour Organisation, 1944: 316). Since then the concept of *social security* has evolved and includes a range of income support measures including privately provided pensions, contributory social insurance systems administered by governments and general tax-funded government social assistance payments. Social security measures, especially of the private contributory kind (based on agreements between employers and employees and regulated by government) are typical of industrial countries where there is virtually full employment.

³ The institutional impacts of social grants are analysed against the changes made in the approach taken to policies, legislation, procedures and structures through which social protection benefits are provided using public funds and distributed to those in need.

⁴ The developmental impacts of social grants are analysed using specific criteria to assess their efficacy in transforming the development outcomes for the poorest citizens. These criteria include the 1. Coverage of social grants in terms of the categories of people the grants are required to reach. 2. The distribution in terms of race, gender and spatial location of grant recipients. 3. The impacts of the grants on household income of poor households. 4. The impacts of grants on inequality.

Traditionally social security measures have their basis in social accords negotiated between workers, employers and by governments and are designed to cover temporary hardships that individuals experience during their life cycle. This form of social security assumes almost full employment of the working age population and characterises welfare states of Europe (Taylor, 2007). In the wake of financial and economic crises in the 1990s resulting in increasing unemployment, continuing and deepening poverty and widening inequality institutions such as the International Labour Organisation (ILO) led policy debates on the need to mobilise action on social security (World Commission on the Social Dimensions of Globalisation, 2004). In the aftermath of recurring global economic and financial crises (Asian financial crisis of 1998 and the financial crises triggered in the United States of America in 2008) the importance of rethinking the role and functions of traditional social security measures once again came to the fore. Globalisation and the internationalisation of production processes undermine national agreements and compromises reached between governments, workers and employers on social security. Although the ILO understanding of social security does reflect a change because of the effects of economic and financial globalisation processes it still largely retains the original conception as:

“The adoption of public measures to ensure basic income security to all in need of protection, in order to relieve want and prevent destitution by restoring up to a certain level of income which is lost or reduced by reason of inability to work or to obtain remunerative work due to the occurrence of various contingencies: sickness, unemployment, old age, employment injury, family responsibilities, maternity, invalidity, or death of the breadwinner.” (ILO, 2008: 3).

The ILO (2008) statement acknowledges that an increasing number of employable adults are unable to obtain remunerative work. In South Africa, recommendations made in the Report of the Committee of Inquiry into Comprehensive Social Security (referred to as the Taylor Report, 2002) recognise that traditional approaches to social security are inappropriate in the context of structural unemployment, mass poverty and widening inequalities. It is not possible to adopt a model of social security that assumes full employment because of the form of racial capitalism that existed and continues to dominate in South Africa and that excludes large parts of the black African population from skilled jobs. Both social and economic indicators show that individuals are not able to contribute to social insurance payments if they are not in formal employment and earning a decent wage. Highlighting the structural inequalities and distortions imposed by apartheid, that result in high and persistent levels of unemployment, chronic poverty and growing informal work, the Taylor Report proposed that South Africa expands its’ social assistance coverage as the first pillar of a comprehensive social protection system so that this first pillar would provide protection and act as a springboard for wider developmental possibilities of South Africa’s poor.

Policy proposals to address poverty and destitution through government social assistance cash grants also include a comprehensive range of measures to address multiple deprivations in health, education, and basic services as well as contributory measures such as social health insurance, retirement benefits

and pensions. These recommendations (Taylor Report, 2002) continue to spur debates on the appropriateness of a comprehensive social protection system to address poverty, reduce inequality and promote social cohesion. Social assistance benefits in the form of government cash grants are typically designed as temporary forms of relief to poor unemployed individuals in a residual, safety net fashion with the assumption that such individuals will be able to pick themselves up and find work after the temporary hardship has been overcome.

In this conceptualisation cash grant benefits essentially seek to ameliorate the temporary difficulties of those who cannot get paid work because of ill health, disability or other factors not related to structural conditions. This is consistent with a residual policy approach to social assistance through cash grants as the state or government steps in as a last resort when the individual is unable to get assistance through the family, the community and market systems. Residual approaches assume that the structures of society are functioning optimally and that any setbacks that individuals experience are temporary. Such an approach also assumes that people will be able to overcome the temporary adversity and integrate into economic and social systems through their own corrective action and with support of their family and/or the government as a last resort. It does not take account of the structural or initial conditions that create poverty and inequalities and that exclude large parts of society from economic and social activity.

A residual approach ignores deprivations in education, health care, access to housing, social welfare services and land, and leaves the structural roots of poverty and inequality in place. In the context of growing unemployment and casualisation of work, deepening poverty, macro-economic shocks, financial volatility, the HIV/AIDS crises and other disasters such a short term approach to social assistance would not address South Africa's social and economic conditions. For these reasons a comprehensive social protection approach system that provides the building blocks for addressing income and asset based poverty and deprivations in education, health and services is significant. This policy approach incorporates both developmental and transformational potential.

As a starting point, I acknowledge that the government of South Africa adopted, at a conceptual level, a comprehensive approach to social protection and includes in this conception parts of what the government calls the social wage⁵. Social grants, as a crucial component of comprehensive social protection, can achieve improvements in the quality of life of those living in poverty and destitution. Four ways in which social grants can achieve policy outcomes that not only improve welfare outcomes but also contribute to development and transformation are identified.

⁵ The social wage includes access to certain basic services such as primary and secondary schooling, health care, housing, specified allocation of water and units of electricity.

First, social grants as a policy instrument can achieve a welfare function with the intended policy outcome being that of temporary relief designed as a short term intervention to address shocks such as unemployment and related risks, and vulnerabilities.

Second, social cash grants also have a protective function when the intended policy outcome is designed to ensure a minimum level of well-being for people who live in extreme destitution due to income poverty.

Third, evidence shows that recent interventions through cash grants can have a developmental or generative function when these grants are linked to processes that act as a platform or springboard for household economic activity. The intended outcome of such grants is expected to go beyond individual welfare to ensure household and local development outcomes.

Fourth, social cash grants have a transformative function when they lead to outcomes that institutionalise interventions to address income disparities over the life cycle of income poor households and when they change power relations in terms of race, gender and spatial locations of people (Taylor, 2008).

Taking these functions and outcomes into account and looking back over 20 years of democracy, I find that it is in the last decade that the South African state began to recognise the potential of social grants as a policy instrument that address multiple dimensions of poverty. The last decade shows changes in South Africa's social assistance system from that of a fragmented, race-based and residual approach underpinned by conservative liberalism to an approach that is comprehensive, inclusive and is buttressed by human rights as framed within the Constitution of the Republic of South Africa, Act 108 of 1996. While recognising that social policies include a wide range of social and economic activities that promote human well-being and development, this paper limits its review and focus to the policy intervention of government social assistance cash grants and its institutional and developmental impacts. The coverage (distribution) and access to cash transfers arise from changes in policy and legislation (refer to Table 1) and this in turn has led to the institutionalisation of social cash transfers as part of a comprehensive social protection system of benefits and services to South Africans.

Policy shifts include changes in how social protection is understood, its links to sustainable, equitable development and its relevance as a comprehensive response to poverty and capability deprivations. Such shifts are a departure from a piecemeal safety net or residual welfare approach to poverty towards one which is comprehensive, developmental and that is today acknowledged as a necessary component of growth with human development and equity. Social protection ensures inclusive social development

by ensuring that protective, preventive, transformative and generative measures are in place for human well-being across all sectors of society (Taylor, 2008).

This shift in our understanding of social protection reinforces the progress made in expanding a rights based approach to social policy in South Africa and gives effect to the Constitution of the Republic of South Africa, Act 108 of 1996. Soon after the adoption of the Constitution of the Republic of South Africa, President Mandela reflected on the enormity of the task of transformation in his address to the African National Congress's (ANC's) 50th National Conference in 1997. He stated that:

“The country we have inherited is essentially structured in a manner which denies us the possibility to achieve the goal of creating a new people-centred society. Accordingly, the realisation of this objective, from which we will not depart, requires that we work to transform our country, fundamentally”. (Mandela, 1997 –President's Report to ANC)

Many dimensions of well-being (such as health, education and income) together give people the building blocks that enable them to get out of poverty and to utilise economic and social opportunities to promote individual and collective development. A multidimensional approach to poverty, one that includes a mix of social protection measures, fits well with a freedom-centred approach to development as articulated by Sen (1999). These dimensions include aspects of living standards, such as decent waged work, literacy (schooling) and health (life expectancy, infant & maternal mortality).

The South African Constitution, the social and economic context of extreme hardship and deprivations of the majority, and increasing levels of inequality support the case for a comprehensive social protection system. Importantly, in this respect, the South African Constitution of 1996 mandates the right of access to health care, food, water and social security under Chapter 2 of the Bill of Rights. Specifically, Section 27 (1) (c) states that everyone has the right of access to social security, including, if they are unable to support themselves and their dependents, “appropriate social assistance.” Subsection 27 (2) states that: “The state must take reasonable legislative and other measures, within its available resources, to achieve the progressive realisation of each of these rights” (South African Constitution, 1996). This Constitutional mandate is also reflected in a political mandate expressed in the Reconstruction and Development Programme of the African National Congress (1994: 52-57).

The African National Congress at its' policy conference in Stellenbosch in 2002 (ANC, 2002) adopted the Taylor Report recommendation that the South African government move away from a traditional social security concept towards a comprehensive social protection framework in responding to the needs of all citizens and prioritising those in greatest need. A comprehensive social protection framework would be expected to provide minimum standards of well-being to people in dire circumstances enabling them to live with dignity. This conceptualisation of social protection would move the

government away from an approach that views social grants as a residual policy function that focuses simply on the welfare of the poorest as a last resort.

As a policy framework social protection recognises that alongside chronic, intergenerational poverty and structural unemployment, economic and financial crises are part of the global economy that affects all of society. The thinking in the Taylor Report (2002) has its' basis in comprehensive social protection measures (income support, education, health, housing, assets, basic services) that constitute a foundation or floor at a societal level for the promotion of social justice and social cohesion, the development of human capabilities and the promotion of economic dynamism and creativity (Taylor, 2007). Strategic and deliberate policy choices on the place and role of cash transfers within social policy have been on the agenda of the African National Congress and the South African Government prior to and post 1994. Part of agenda setting on social policy emerged through the establishment of review committees and inquiries as well as policy and legislative changes, some of which are reflected in Table 1. These shifts in thinking and in policy and legislation are gradually taking effect and result in a significant intervention through a social grant system that today reaches over 30% of the population.

The Taylor Committee (refer to Table1) recommended that the South African Government adopt a comprehensive package of social policy measures to address multi-dimensional poverty and deprivations. Because of the structural basis of poverty and inequalities it was clear that a single policy measure or instrument would be inadequate. A comprehensive package should address asset based poverty, capability poverty, income poverty and deprivations in services. Recommendations in the Taylor Report include measures such universal access to health care, education, housing, income support in the form of cash grants to those who were in income poverty, basic services (sanitation, water, transport) as well as social welfare services.

Other recommendations in the Report include detailed proposals on changes to the institutional arrangements and the financing of social protection. The Report proposed the establishment of a national agency to administer social grants because of the problems experienced through Provincial Government. Funding allocations made to Provinces were not ring fenced specifically for social grants and as a result payments to qualifying recipients were either delayed, or people were kept on waiting lists for long periods of time. This led to a number of Constitutional Court challenges. Government approved and implemented the recommendations of the Report on the comprehensive approach, on the extension of the child support grant and on a range of other issues related to unemployment insurance and retirement benefits. The issue related to shifting the administration of social assistance to the national sphere with the establishment of a national social security agency was accepted. The FFC played a significant role in this process.

Issues on the social protection agenda today are about the following. What provisions should constitute the basic package of social protection? Who should be receiving such benefits? How do we determine and benchmark the level at which provisions are made? What instruments would be required to monitor and evaluate the impact of social protection programmes? What are the distributional impacts of benefits? How do governments build capacity for implementation at national, regional and local levels? These and other questions are an important part of the strategic social protection agenda in South Africa. Within the range of social protection measures social cash grants are a critical benefit and act as a lifeline for the poorest households. South Africa takes a categorical approach to decisions on who should receive social grants. The categories of people who are experiencing vulnerabilities due to stages in the life cycle and who meet the qualifying criteria (they have to meet a means test) include people who are 60 years, children up to 18 years, people with disabilities, war veterans and children in foster care. The next section of this paper discusses some issues in relation to the roles of the different spheres of government and the delivery of social assistance to South Africans trapped in poverty.

3 ROLES OF DIFFERENT SPHERES OF GOVERNMENT IN SOCIAL TRANSFERS

The Constitution of the Republic of South Africa (Act 108 of 1996) designates national, provincial and local government as separate and autonomous ‘spheres’ of government and they are not the same as tiers or levels in a hierarchical system. Each sphere of government while being distinctive is part of an interdependent and interrelated system of co-operative government. Chapter 3 of the Constitution specifies eight principles of co-operative government and intergovernmental relations to guide implementation in relation to the competence and functions of each sphere. According to Chapter 3 of the Constitution all spheres of government are to respect each other's powers and functions and are to work in close co-operation with each other. In Schedules 4 and 5 of the Constitution areas in which the three spheres have exclusive competency and those where they share concurrent powers are spelt out. These areas are of relevance for the delivery of social assistance and transfers such as cash grants.

Although there are 3 distinctive spheres of government, the national government has a duty of ‘supervision’ or oversight over the other spheres. Supervision in this instance includes the power to intervene, issue directives and even to take over responsibility under certain circumstances. The power of supervision is counterbalanced by a corresponding duty to assist in building the capacity of the provincial and local spheres of government to deliver on

constitutional and legislative mandates. The National Council of Provinces (NCOP) has an important role to play in considering and approving national interventions into the provincial sphere and provincial interventions into the local government sphere (UNDP, South Africa Human Development Report 2000). Institutional arrangements for the delivery of social grants take place within the principles of co-operative governance.

Table 1: Policy and Legislative Changes in Social Assistance grants: Towards comprehensive social protection – post 1994		
	Policy Processes →	Changes in Social Assistance/Social Security
1996	The Constitution of the RSA Act 108 of	5.27 (1) (c) “Everyone has the right to have access to social security including if they are unable to support themselves and their dependents, appropriate social assistance. Benefits and entitlements are linked to citizenship within a human rights framework.
1996	<i>The Report of the Lund Committee on Child and Family Support (Lund Committee, 1996)</i> Lund Committee of Inquiry into the affordability of the State Maintenance Grant. It undertook an appraisal of the existing state maintenance grant system of support to children and families and investigated the option of compelling parents to provide financial support for their children through the private maintenance system.	<ul style="list-style-type: none"> - Regulation R417 of 31/03/1998 phased out the state maintenance grant through amendments to the Social Assistance Act no. 59 of 1992 & introduced a Child Support Grant for children up to the age of 6 (under the age of 7) years according to a ‘means’ test. - It also introduced the concept of a ‘primary care giver’ <p>It de-racialised grants to children and introduced means tests according to which children became eligible for a grant that was considerably lower than the State Maintenance Grant in monetary value.</p>
1997	White Paper for Social Welfare	<ul style="list-style-type: none"> -Makes provision for “a welfare system that facilitates the development of human capacity and self-reliance within a caring and enabling socio-economic environment” (RSA, 1997: 9). -Promotes the provision of developmental social welfare services through partnerships with the non-governmental sector and private sector providers. - Provides a strategy for provision of social security including social assistance. - Places emphasis on selectivity according to means tests – targets vulnerable, special needs and the poor (RSA, 1997:8.4)
1999	Findings of the Inter-Departmental Task Team (1999)	<ul style="list-style-type: none"> - Focused on the lack of employment based private insurance among low income workers as a potential burden on fiscal resources (1999) -Recommended extension of state funding for Unemployment Insurance Fund (UIF); mandatory contributory retirement pensions to reduce claims for state old age pensions. -The Report rejected universal coverage, and focused on social security for 3 categories- residual social assistance to the poorest ; the middle income earners would receive state subsidised benefits and high income earners would have access to private provisions through their own arrangements.
2000-2002	Taylor Committee of Inquiry into Comprehensive Social Security (Taylor, 2002:41) The Committee’s terms of reference covered a number of areas related to government social assistance, social insurance including health, unemployment and retirement benefits linked to employment, measures to address poverty and to address gaps in the existing social security system. The Committee was to propose institutional arrangements to ensure the feasibility, sustainability and affordability of the social security system. This involved considerable planning, political and policy debate and consultations with social partners and all sections of the community.	<p>The Committee made significant recommendations on the entire social security system and argued for a social protection system that would integrate government social assistance, compulsory social insurance measures and private contributory arrangements into a single benefit system. It recommended a comprehensive social protection (CSP) package:</p> <p>Comprehensive social protection for South Africa seeks to provide the basic means for all people living in the country to effectively participate and advance in social and economic life, and in turn to contribute to social and economic development. Comprehensive social protection is broader than the traditional concept of social security, and incorporates developmental strategies and programmes designed to collectively ensure a decent acceptable living standard for all citizens. It goes beyond social safety nets to focus on causality through a policy approach that includes economic and social objectives.</p>

4. INSTITUTIONAL CHANGES AND IMPACTS

The overarching legislative framework for social assistance is rooted in the Constitution (Act No. 108 of 1996) and especially in chapter 2 which is the Bill of Rights. As a result all South Africans are entitled to certain basic socio-economic rights such as the right to have access to healthcare services; social security; sufficient food and water; adequate housing and a safe environment. Over and above these rights, additional protection afforded to children includes the right to basic nutrition, shelter, basic healthcare services, social services and protection from abuse and neglect. These aspects fit well with the conceptual framework of social protection as recommended by the Taylor Committee.

Together with the Constitution, a major policy instrument for improving social development is the White Paper for Social Welfare approved in 1997 which provides an important policy framework for the provision of social protection and developmental welfare services for all. To give effect to the social security rights the Social Assistance Act, No. 13 of 2004 was passed after extensive review of social security arrangements in the country. This Act among other forms of provision makes specific provision for children living in poverty through the Child Support Grant (CSG), Foster Care Grant (FCG) and Care Dependency Grant (CDG). The Children's Act (Act No. 38 of 2005, as amended by the Children's Amendment Act, Act No. 41 of 2007) also sets out principles related to the care and protection of children. Some of the most important principles include early childhood development and compulsory primary education. The National Health Act, No. 6 of 2003, ensures access to free primary healthcare, and in particular free healthcare to pregnant women and children younger than six years old.

The provision of social grants and other protective measures are dealt with by these and other policy frameworks and legislation and give effect to the constitutional mandates for social protection within the progressive realisation of social and economic rights. The Social Assistance Act of 2004 made provision for a major shift in social assistance by locating the responsibility for social assistance delivery entirely in hands of the national government. The Social Assistance Act Number 13 of 2004 regulates the payment of social assistance and makes provision for an agency, the South African Social Security Agency, to administer grant payments. These Acts and regulations provide institutional arrangements and norms and standards to ensure that the administration of social grants takes place efficiently and effectively.

Institutional arrangements & the Division of Revenue

One of the key problems with administering grants through the provinces was that each province was required to provide for grants from their nationally allocated budgets (based on the equitable share

process). This required provinces to apportion their budgets according to competing demands from, amongst others, the social development and health and education portfolios. The process led to differences in implementation of the distribution of social grants from one province to the next. In some instances provinces allocated insufficient funds from their budget allocations to social grants and social welfare services which led to applicants for social grants being put on long waiting list. At the time the Taylor Report noted: “A key concern relates to the fact that three social policy areas of major national significance, social security, health and education, are budgeted for at a provincial level. The link between national policy determination and provincial decision-making is consequently weak. This affects the degree to which provinces adhere to national policy, and the extent to which financial resources are allocated according to national priorities” (Taylor Report, 2002).

Among the many problems created by the lack of clarity of the finance and fiscal arrangements for cash transfers was the inability of provinces to deliver on constitutional obligations to those who qualified for social grants. Other problems included a disintegrated social security system, lack of uniform norms and standards, lack of uniform grant administration processes, lack of human resource capabilities, ineffective information technology systems and ineffective interface with both the public and other systems within government such as the Department of Home Affairs, poor management of service providers, costly grant administration processes, and, fraud and corruption. Poor administration of grants within a number of provinces also led to legal challenges for the Department of Social Development and its provincial counterparts. In one notable case heard ultimately in the Constitutional Court, *Mashavha vs v President of SA & others* (Constitutional Court Case CCT 67/03) the Court ruled that it was unconstitutional for the national department to delegate the distribution of grants to the provinces as it was not merely an administrative function (Department of Social Development, 2013).

A significant aspect of the Social Assistance Act 2004 was that it opened the way for grants to be made and administered through a national process rather than through the provincial administrations as had previously been the case. This was in line with the Taylor Report recommendation for the establishment of an agency “to operationalise various social security functions outside of the civil service” and which would have “the function of managing the noncontributory social assistance fund, including budget determination and grant administration” (Taylor Report, 2002). The Social Assistance Act establishes a direct link back to the Constitution and to the White Paper on Social Welfare of 1997. The functions of the National Department of Social Development and that of the Minister today incorporate the establishment of a branch responsible for Comprehensive Social Security and also result in the establishment of the South African Social Security Agency (SASSA).

SASSA’s establishment in 2006 complies with Schedule 3A of the South African Constitution as a Public Entity. The main purpose of SASSA is to transform the delivery and administration of social

security by integrating and consolidating the functions allocated to the 9 provinces into a single delivery system. Processes of standardising administration of grants and of ensuring uniformity and efficiency in the delivery of the various social grant services are on-going. Efficiencies in grant administration, in savings from removing fraud and corruption in the system results in a steady increase in demand for services with the number of beneficiaries growing from approximately 11 million in 2006 to over 16 million at present (Department of Social Development, 2013). With the development of SASSA and the growth in the number of beneficiaries other challenges are emerging. These include the need to consider better automation in the delivery system, improvements in staffing and the capabilities of staff and the regular monitoring of potential for fraud and corruption to ensure that these aspects are addressed.

Dealing with Fraud and Corruption

Over the years SASSA and its predecessors lost millions of Rands to corruption and fraud. Significant measures are now in place to curb fraud including massive government public awareness campaigns against fraud, corruption and mal-administration. As a result of a fixed term indemnity a considerable number of people came forward in the period 2004/2005 and were removed from the grants registers. In recent years SASSA has contracted the Special Investigations Unit (SIU) to assist with investigations resulting in a number of criminal cases being opened and prosecuted where evidence of fraud and corruption were identified. At the same time SASSA has been developing its own in-house capacity (but still being assisted by other government agencies) to fight fraud and corruption. SASSA's "Fraud Management Strategy" focuses on prevention, detection, investigation and resolution. SASSA is currently tackling and prosecuting syndicates across the country committing social grant fraud. Syndicates are comprised of current SASSA employees, medical officers, touts, and unsuspecting community members who are being recruited as so called beneficiaries. In the process SASSA successfully roots out 'ghost' beneficiaries and those with fictitious identification numbers or fake court orders and medical reports (the latter in the case of disability grants).

Part of the programme to deal with fraud, through a zero tolerance approach, includes the complete re-registration of all beneficiaries including the opportunity for persons to voluntarily cancel their registration. This resulted in life certification of all beneficiaries, children and guardians. By the end of the 2012/2013 financial year SASSA had received requests for voluntary cancellation of over 150 000 social grants, leading to a saving of R150 million per annum. Up to the beginning of February 2014 this number has increased to 299 837 with a resultant saving of approximately R300 million per year (Petersen, 2014). As a result of the re-registration process more than 8 000 jobs were created for unemployed youth, 3 000 of whom were subsequently placed in permanent positions (Petersen, 2014).

5. SOUTH AFRICA'S SOCIAL ASSISTANCE GRANTS: SOME DEVELOPMENTAL IMPACTS

Social Grants: A categorical and means tested approach

South Africa takes a categorical, means-tested approach to social grants. This approach differs from a system of social protection that is universal and available to all those who wish to access it. The categories who receive cash transfers include children, people with disabilities, people who are over 60 years and those who experience vulnerabilities through the life cycle such as orphans, people affected by HIV/AIDS and those who experience shocks and distress through fire and floods. Even though the system is designed to provide assistance to specific categories such assistance is 'means tested' against financial need and not universal to the entire population in the specific category.

Currently the categories who qualify for social grants according to eligibility criteria are older persons (over 60 years who receive the Social Old Age Pension - SOAP), war veterans, adults living with disabilities, children living in poverty (who receive the Child Support Grant - CSG), children with disabilities, children in foster care and people in social distress.

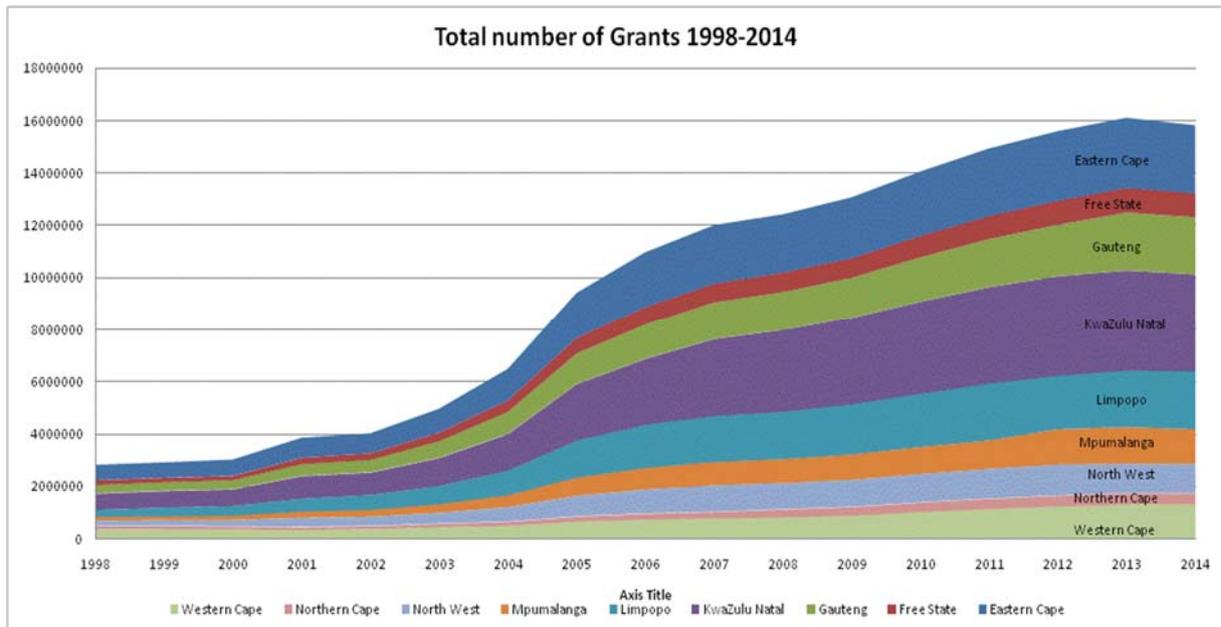
Social assistance is non-contributory and is financed entirely from government revenue. Because the system is not universal and is categorical there is a huge gap in income support for those who are without waged income and in the age category between 18 to 59 years. This gap in support refutes the government's characterisation of the social assistance system as rights-based and non-conditional (Department of Social Development, 2013). Despite this gap the social assistance programme has increased from 2.7 million recipients in 1994 to 16 million recipients by 2013. Of these approximately 2.9 million are above the age of 60, while 11.3 million are beneficiaries of the Child Support Grant. Another 1.1 million are people with disabilities (Twenty Year Review, 2014: 45).

The distributional impacts of social grants

Social grants are conceptualized as a critical part of a comprehensive package of social protection measures that provide support 'in cash or in-kind' to reduce poverty and to enable individuals to meet their basic needs. Although initially seen as a short-term measure to address poverty, social grants have increasingly become a source of livelihood in South Africa and have played an instrumental role in reducing poverty levels. The General Household Survey reveals that the percentage of individuals who benefit from social grants has increased from 12, 7% in 2002 to 29,6% in 2012. It is notable that the percentage of households that received at least one grant increased from 29,9% to 43,6%. The Eastern

Cape has the highest percentage of individual beneficiaries at 40,3%, followed by Limpopo at 37,7% and KwaZulu-Natal at 36,1%. Significantly higher percentages of households, where at least one grant is received, are in Limpopo, with close to 59% (58,8%), in the Eastern Cape (58,2%), and in the Free State (53,1%) compared to 27,2% of households in Gauteng and 34,2% of households in Western Cape (Stats SA 2012 – General Household Survey). This is in line with poverty trends and vulnerability profiles of individuals in these provinces. The total number of grants distributed in each province is reflected in the graph below which depicts the increase in grant recipients over the period 1998 to 2014.

Figure 1. Numbers of Grant Beneficiaries per Province 1998 -2014



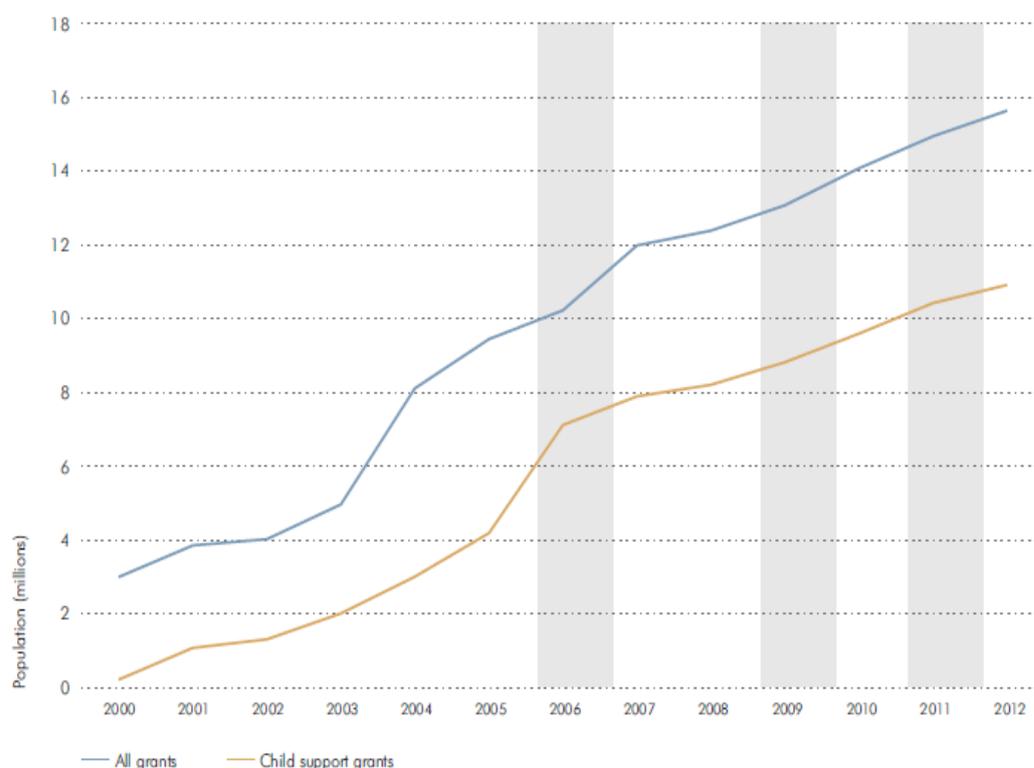
Source: Graph from own calculations compiled from Department of Social Development Socpen Data, 2014

A study conducted by the Economic Policy Research Institute (Samson et al, 2013) finds that social grants make a significant impact on household incomes, in helping families cope with vulnerability and in mitigating risks. Taking the six main grants that form government’s social assistance programme the study (Samson et al, 2013) finds that today the grants make a significant impact on reducing the intensity of household poverty or the poverty gap which measures the distance below an income poverty line for all poor. The graph on the previous page highlights the expansion of South Africa's social assistance system. Noticeable growth can be seen since 2000 when grants reached approximately 3 million beneficiaries to 2014 with close to 16 million individuals benefitting.⁶This is the largest of the South African government’s direct cash transfer programmes designed to address poverty of targeted categories of vulnerable individuals.

⁶ Note that there is small decline from 2013 to 2014. This is primarily as a result of concentrated campaign to eliminate fraud and duplication in the allocation of grants.

Such significant growth in grant beneficiaries is linked to the policy proposal that government phase in the expansion of the Child Support Grant (CSG) between 2002 and 2014 for children from the age of 12 until all children up to the age of 18 years who qualify receive the grant (Taylor Report, 2002). The coverage of the grant expanded to initially include children up to 13 years, then those between 15 to 16 years and today includes children up to 18 years. The increase in the number of children receiving the grant⁷ importantly results in reducing the intensity of poverty or the depth of poverty but does not remove individuals from below the poverty line. Figure 2 provides an indication of the growth in child support grants against all grant types (Statistics South Africa 2014:20). The impact of this increase in the number of grants on reducing child poverty is significant.

Figure 2: Growth in Grants 2000 - 2012



Source: Statistics South Africa, 2014, Poverty Trends in South Africa An examination of absolute poverty between 2006 and 2011, Report No. 03-10-06

Grants as a proportion of household income

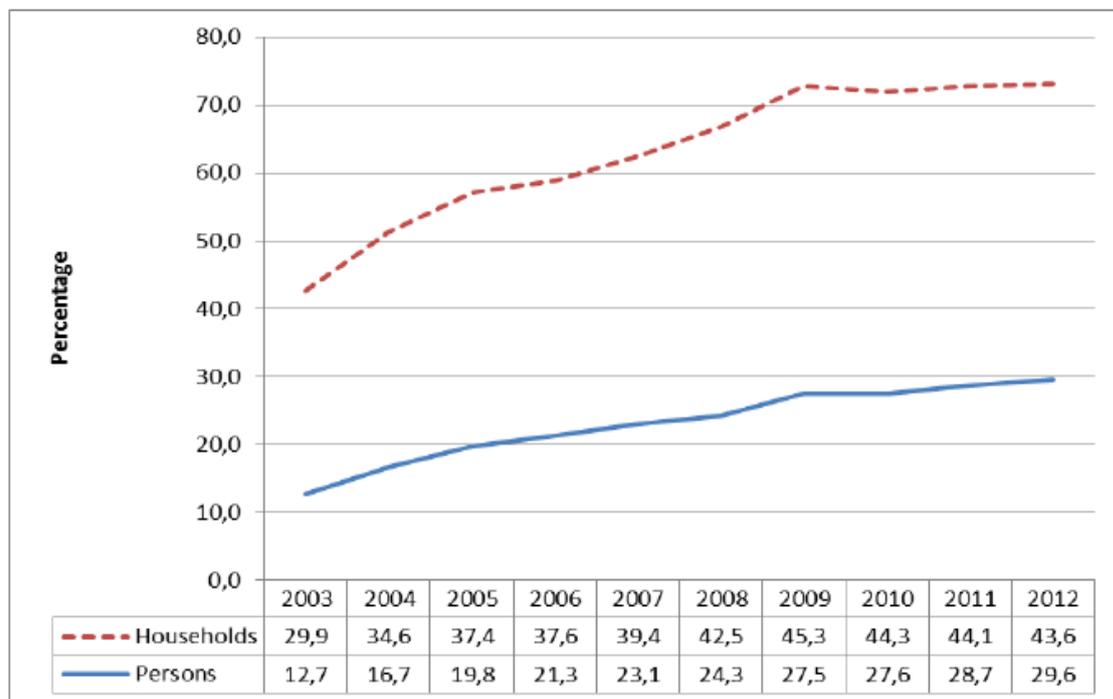
Formal unemployment and the lack of waged work are among the main reasons why many households remain income poor. The General Household Survey (Statistics South Africa, 2012) finds that while most South African households continue to rely on incomes from salaries with nationally 64,9% relying on salaries as the main source of income, social grants remain a critical and at times the only source of income for 43,9% of households. Not surprisingly provinces which are the economic hubs in South Africa have households that rely more on income from wages than from other sources including grants.

⁷ Although children are said to receive the grant it is actually paid on their behalf to their primary care-givers.

The Western Cape which has 77,3% of households and Gauteng with 75,6% of households were most likely to report salaries as the main source of household income. This is in contrast to households in Limpopo (59,3%) and Eastern Cape (58,4%) who reported that grants were more significant than salaries as a proportion of household income.

Increases in the percentage of households and individuals in receipt of social grants are noticeable between the period 2003 to 2012 as depicted in Figure 3. While the percentage of individuals receiving social grants increased from 12,7% in 2003 to 29,6% in 2012, the percentage of households receiving at least one grant increased from 29,9% in 2003 to 45,3% in 2009, before declining slightly to 43,6% in 2012 (Statistics South Africa, 2013: 20).

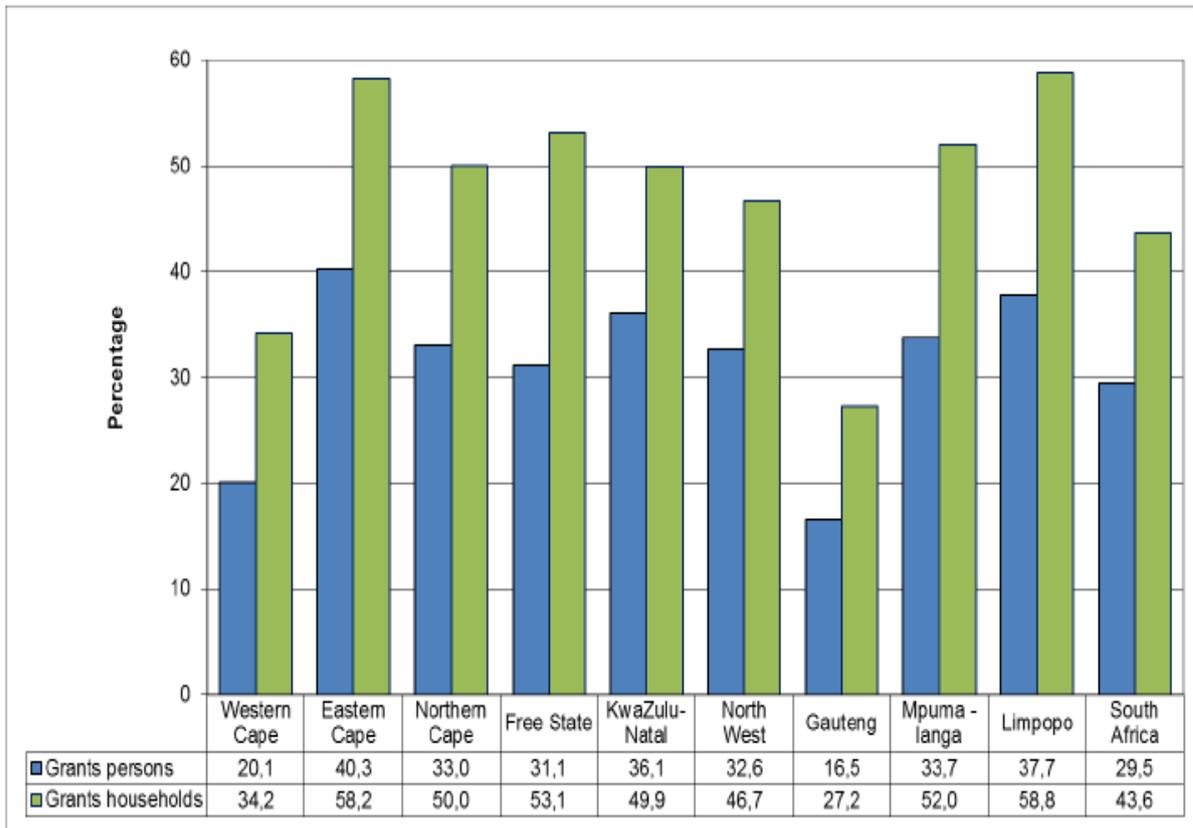
Figure 3: Percentage of persons and households who have benefited from Social Grants 2003 - 2012



Source: Statistics South Africa, 4 October 2013, General household survey 2012, Statistical release P0318

The graph in Figure 4 provides a provincial breakdown of individuals and households receiving grant income (Statistics South Africa, 2013:20).

Figure 4: Percentage of individuals and households benefiting from Social Grants - 2012



Source: Statistics South Africa, 4 October 2013, General household survey 2012, Statistical release P0318

Distribution of grants according to race

As would be expected race continues to play a significant role in defining those who live in multidimensional poverty and who experience intergenerational cycles of deprivation that keep households and individuals trapped in poverty. The face of poverty in South Africa continues to be black African females. From being largely excluded from accessing social grants prior to 1994, black African households are increasing their shares of social grants take up. According to Statistics South Africa approximately 37,4 % or more than one-third of black African individuals receive a social grant, compared to 26,3% of coloured individuals, and 14,1% of Indian/Asian individuals with 5,5% of the white population receiving grants (Statistics South Africa, 2013:20).

Distribution According to Grant Types

In 2002 eighty per cent of children or 14,3 million children aged 0-17, lived below a poverty line of R490.⁸ Today 11 million children benefit from the Child Support Grant and another half a million benefit

⁸ IDASA, Budget Brief No. 144, 2004, 'Budgeting for child socio-economic rights.'

from foster care grants. By February 2014 there were 15 821 946 people benefiting from government cash transfers. This constitutes 31% of the population. The CSG makes up 70% of grants, OPG 18% and DG 7% (Department of Social Development, 2013).

An important point to note is that although these cash grants provide a life line for those who live in absolute destitution and well below an income poverty line because of the depth of poverty such an intervention does not remove children from poverty and multiple deprivations. This is why it is important to focus on a mix of measures or on comprehensive social protection that includes early childhood development, access to free primary education and essential health care, nutrition, housing and safe neighbourhoods, basic social services and sanitation.

Gender impacts of grants

The Department of Social Development Social Pension data shows that more women benefit than men and that the ratio of women to men in respect of the Old Age Grant is 2:1. Further 98% of the care givers that receive the child grant on behalf of children are female. Yet this does not in any measure reverse the feminisation of poverty that characterises South Africa.

Impacts on Poverty

Financial, environmental and epidemiological crises tend to impose a disproportionate burden on those children living in income poor households. Exclusion from social and economic processes in the form of access to health care and education, food, waged work and income contribute directly to the multi-dimensional poverty being experienced by over 55% of Africa's population. Consensus is strong that access to health care and basic education together with income from decent waged work form key components of a social protection floor. Poverty in South Africa is stark and conspicuous when viewed against decades of privilege afforded to a small minority of the population.

It is not surprising therefore to find dramatic contrasts based on race, age, and gender when the many dimensions of poverty are examined because of South Africa's racialised economic, political and social history. Poverty means not having the resources to meet basic human needs, such as clean water, nutritious meals, healthcare, education, clothing and housing. It is a denial of choices and opportunities and a violation of human dignity (Taylor, 1997). Research (Samson et al, 2013) shows that social grants are reducing the severity of poverty but not removing recipients from below the poverty lines. According to Sen (1999) poverty is best understood as the absence of freedom to achieve the essentials

for life, including waged employment, functional education, health care, food and protective security. As such the expansion of freedoms is seen as both the ends and the means of development. A freedom-centred perspective on poverty is underpinned by a capabilities approach (Dreze and Sen, 1996). The capabilities approach focuses on what people are able to do and to be in the spaces in which they function. In a freedom-centred and capability approach to poverty reduction the emphasis shifts from aggregate measures of well-being to improvements in the lives that individuals have reason to choose and to value.

The Economic Policy Research Institute (EPRI) used three different poverty lines to analyse the severity of poverty and then using a micro simulation model the impact of social grants on the severity of poverty is obtained (Samson et al, 2013). The lowest poverty line used is the food poverty line. According to Statistics South Africa (2013) the food poverty line provides an unambiguous threshold of absolute deprivation. It represents the amount of money required to purchase the minimum required daily energy intake. EPRI calculate the severity of poverty using the value of the food poverty line, the lower and the upper poverty lines for 1993 and 2013. The food poverty line for 2013 is set at R336.18 and they find that using this line 43% of South Africans would be experiencing food poverty without a social grant but when social grants are included this decreases to 25 % (refer to Table 2).

Using the lower bound poverty line at R497.45 they calculate that 50% would be in poverty without social grants in 2013. With an upper bound poverty line of R733.69 their simulation model finds that 58% of South Africans would be in poverty compared to 52% with grants. According to the Table 2 on Poverty Statistics with and without grants they find that pre-grant poverty head counts are similar between 1993 and 2013. This indicates that the severity of poverty without grants would reflect no improvements. The Table also indicates the poverty gap reduction as a percentage of gross national income (GNI). EPRI concludes that it is because of the expansion in social grants that poverty has reduced since 1993 (Samson et al, 2013:2).

Table 2: Poverty lines and poverty rates with and without social grants statistics

		Poverty (nominal Rand)	line	Poverty without grants	Rate social	Poverty Rate with social grants	Poverty Reduction as % GNI	Gap as %
1993	Food	88.71		0.41		0.33	0.95%	
	Lower	131.27		0.50		0.45	1.29%	
	Upper	193.61		0.60		0.57	1.59%	
2013	Food	336.18		0.43		0.25	1.48%	
	Lower	497.45		0.50		0.38	1.99%	
	Upper	733.69		0.58		0.52	2.44%	

Source: Samson, M. et al, 2013. Twenty Year Review of Social Protection Programmes in South Africa. Cape Town. Economic Policy Research Institute

Beyond the social grant impacts on income poor households, Leibbrandt and Woolard find that South Africa's social assistance programme is a very effective policy instrument with which to combat poverty and improve education and health, particularly for children living in poor households. Their research shows that in the bottom quintile, fully two-thirds of household income comes from social assistance grants, with most of this coming from child grants. They note that, as a predictable and reliable source of income, cash grants can have a significant effect on the capacity of households to invest in human and physical capital and to break the inter-generational transmission of poverty (Leibbrandt and Woolard, 2010:19).

The Multiplier effects of social grants

In countries that have introduced unconditional cash transfers significant impacts are made in reducing destitution and deprivation of the poorest as well as in increasing levels of consumption and productivity. The local economic activity in increased consumption patterns leads to positive economic and social returns. There are multiplier effects mainly through local cash circulation although these effects are limited by high transaction and/or administrative costs. Reynolds found in 2005 that the benefit or multiplier effect on the local economy of R60 billion paid to grant recipients was R78 billion. He argued at the time that if cash transfers were part of other measures including decent work for non-working, economically active poor individuals the multiplier effect could be 4 times higher than it was or as much as R240 billion (Reynolds, 2005). Despite these shortfalls estimates are that government cash transfers in the form of the child support grant and social old age pensions increase the income of the poorest 5 per cent of the population by as much as 50 per cent.

Yet South Africa's townships and informal settlements are outcomes of apartheid planning and are part of the contemporary social reality in which patterns of poverty and inequality are being reproduced and income support measures alone will not address the multiple dimensions of poverty. Statistics South

Africa finds that approximately 3 million people live in informal settlements and roughly 15 million in townships (Stats SA 2011). It is these households that remain trapped in extreme poverty because of social and economic barriers. Increasing consumption patterns of poor households and ensuring that income circulates within townships and informal areas is critical to creating local economic enterprise.

The Redistributive Effects of Spending on Social Grants

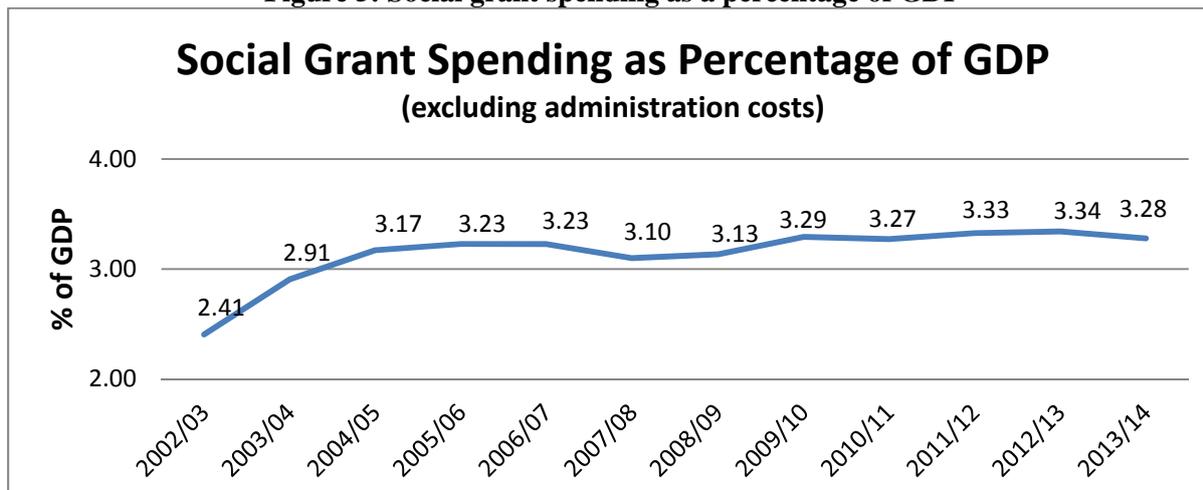
Social Grant spending has increased from 2.41 in 2001/2 to 3.28 by 2013/2014 (refer to Table 3 and the graph in Figure 5). Table 3 shows an increase in allocations from public revenue towards social grants over the period. This allocation is redistributive as it goes directly to non-wage earners and to the extent that it reaches those who live in a state of absolute income poverty it does advance an equitable share of public funds to the poorest households. It increases the consumption patterns of the poorest households and, in this way, social grants reduce household hunger enabling poor people to live longer and healthier lives and to be able to contribute to developmental projects. Children can be afforded transport to school and better nutrition, which contributes to the decrease of under-five mortality and infant mortality (Hall, 2013).

Table 3: Social Grant Spending (excluding administration costs) according to Grant Types and as a Proportion of GDP from 2001 to 2014

	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14
	R million	R million											
Old age	12 954	15 285	17 146	18 504	19 527	21 289	22 889	25 934	29 826	33 751	36 574	39 323	44 328
War veterans	23	27	34	36	28	25	22	20	17	14	12	12	8
Disability	4 585	7 201	10 329	12 570	14 099	14 261	15 281	16 474	16 567	16 840	17 813	19 152	18 116
Grant-in-aid	1	1	2	20	-	-	-	90	146	174	175	188	247
Foster care	364	787	1 142	1 563	1 996	2 851	3 414	3 934	4 434	4 616	5 536	5 951	5 551
Care dependency	226	309	639	760	916	1 006	1 133	1 292	1 434	1 586	1 727	1 856	2 058
Child support	2 400	4 558	7 690	11 431	14 143	17 559	19 625	22 348	26 670	30 342	35 564	38 237	40 277
Social Relief						41	105	623	165	170	160	165	419
Total	20 553	28 168	36 982	44 885	50 709	57 032	62 469	70 715	79 260	87 493	97 560	104 884	111 004
GDP		1 171 085	1 272 537	1 415 273	1 571 081	1 767 422	2 016 184	2 256 484	2 408 076	2 673 769	2 932 729	3 138 980	3 385 369
%		2.41	2.91	3.17	3.23	3.23	3.10	3.13	3.29	3.27	3.33	3.34	3.28

Source: (1) SocPen data provided by the Department of Social Development; (2) Statistics South Africa (2014). "Gross domestic product, Fourth quarter – Statistical Release No P0441" Pretoria: Government Printer; (3) Own calculations

Figure 5: Social grant spending as a percentage of GDP



Source: (1) SocPen data provided by the Department of Social Development; (2) Statistics South Africa (2014). "Gross domestic product, Fourth quarter – Statistical Release No P0441" Pretoria: Government Printer: (3) Own calculations

6 THE NATIONAL DEVELOPMENT PLAN - VISION 2030 - A SOCIAL PROTECTION FLOOR TO ADVANCE A DECENT STANDARD OF LIFE

On 27 April 2009 the United Nations coalition stated that a social protection floor could consist of two main elements that would in turn help to realize human rights⁹ as contained in the Universal Declaration of Human Rights. These are:

- *Services*: ensuring the availability, continuity, and access to essential public services (such as water and sanitation, health, education and family-focused social work support).
- *Transfers*: a basic set of essential social transfers, in cash and in kind, paid to the poor and vulnerable to enhance food security and nutrition, provide a minimum income security and access to essential services, including education and health care.

The overarching framework within which poverty, inequality and unemployment is South Africa's *National Development Plan 2030: Our Future: Make It Work* (NPC 2012). Chapter 11 of the NDP states that together with social partners a social floor should be determined that can be progressively realised as part of a wider process of achieving a social compact. The initial approach is to engage on the key questions that we need to focus on to promote dialogue on the social floor rather than try to reach finality on answers that among others define the elements of the social floor itself. The aim is to focus the nation's minds around specifics to address poverty by firstly reducing the poverty gap and also in the long term (by 2030) enable people to achieve a decent standard of life that is buttressed by a

⁹Human rights relating to health, education, employment, social security, water and sanitation are reflected in the Universal Declaration of Human Rights, paras. 22, 25 and 26, and subsequent legally binding treaties. These rights are also reflected in the Bill of Rights in South Africa's Constitution of 1996.

social floor. Chapter 11 together with other chapters is now performance outcome 13 of National Government – DSD. Implementation of Chapter 11 in the NDP links with objectives in other chapters that also address elements of social protection such as the economy and employment, education, health and infrastructure as all of these contribute to a social protection floor and in turn assist households to attain a decent standard of life.

As a critical part of public policy a social floor provides support that reduces vulnerability, alleviates and ultimately prevents poverty, and empowers individuals, families and communities to attain a decent standard of living. The goal is to determine what combination of public and private services are necessary to attain a vision of universal and inclusive systems of social protection with an agreed social floor being the central platform. How do we arrive at a defined social minimum or social floor that prescribes a standard of life below which no one should fall? How do these aspects link with reducing the cost of living so that a decent standard of life is attainable in the poorest households?

Linking the social floor to a decent standard of life and reductions in the cost of living involve a number of complex processes and a wide range of actors. It would affect workers, unemployed people, children, youth, the elderly, businesses, and government and independent constitutional bodies. Much research and evidence already exists on elements of a social floor. The NPC, with social partners intends in the next 6 months to determine what additional work needs to be done to ensure that through a comprehensive system of social protection all South Africans will be able to attain a decent standard of life.

What policy and technical guidance can the Finance and Fiscal Commission provide in this process? The NPC and indeed the country require guidance on what is achievable in the long term within our current fiscal capacity and within the parameters of our projected fiscal capacity. Are there ways to enhance our fiscal capacity through the tax system?

7. CONCLUSION

Two decades after democracy the South African government has expanded the social grant system to cover over 30% of the population. It has institutionalised policies and put into place administrative systems to ensure accountable and efficient grant administration. Grants are having a developmental impact on poor households by reducing the risk of deepening poverty. This paper finds that the grants perform the welfare and protective function when it comes to household poverty. Improvements in the human development of people receiving grants are also evident.

Yet the triad of poverty, inequality and unemployment continue to be among South Africa's major challenges. Twenty years since the country attained political freedom economic insecurity and unfreedoms leave many in situations of extreme destitution. Social protection measures in South Africa that include cash transfers, such as pensions for the elderly, grants to children and households, cash for food and public works programmes increase access to nutrition, health care, housing and education. In its most direct form cash transfers provide support that helps individuals, households, and communities to better manage risks and actively participate in all spheres of life.

At a fundamental level the transformative and developmental impacts of social grants are reduced because South Africa's social protection system excludes a large proportion (approximately 70%) of young black African youth between the ages of 18 and 35 years who fall outside the system and who are without waged work. In addition retrenchments in the mining and manufacturing sector and low skill levels of Africans in the age cohort between 35 to 59 means that this group continues to live in poverty and is increasingly alienated from economic and social activity. They represent approximately 11 million households that receive no or little income (Statistics South Africa, 2013). As long as this situation continues the vision contained in the National Development Plan, Vision 2030 (National Planning Commission, 2011) of reducing the proportion of the population living below a lower bound poverty line (R443 in 2011 prices) to 0% by 2030 and of reducing income inequality as measured by the Gini-coefficient from 0,7 to 0,6 will remain elusive.

South African researchers and policy makers valorise the aggregate improvements and impacts of social grants on household poverty and household consumption patterns. While these impacts undoubtedly are significant at an aggregate level we have to ask many more questions. From a social policy perspective we need to ask: "Are social grants being used to compensate for other policy failures such as labour market strategies and employment policies? Further, are the objectives of good social grant policy and programme benefits being diluted and diffused because of economic and industrial policy weaknesses?"

South Africa is achieving significant welfare outcomes in ameliorating the poverty of those living in absolute destitution. Yet this achievement does not deal with the poverty and inequalities that arise from the structural conditions that are embedded in the social and economic systems of society. Social grants are a step towards transformation but, in and of themselves cannot achieve the transformation needed unless they are part of a comprehensive social protection system that is fully inclusive and links with processes that democratise the economy and lead to a decent standard of life for all.

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