



HSRC
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REVIEW

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**MDG4: To ensure
all children live long
and healthy lives**

**MINING: IMPACT OF
MECHANISATION**
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MDG 2015 AND BEYOND
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**TB THREAT: PATIENTS
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PRODUCTION

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CEO Olive Shisana (left)
and Professor Linda Richter (right).

HSRC bids farewell to two of its most remarkable women leaders

In July the HSRC took leave of two of outstanding researchers, leaders and colleagues after 14 years at the organisation: CEO Olive Shisana, a UCT honorary professor, groundbreaking researcher and expert in the social aspects of HIV and AIDS and health system, and until recently chair of the South African BRICSThink Tank; and Professor Linda Richter, distinguished research fellow in the HIV, STIs and TB programme, an A-rated scientist, honorary professor at two universities and a research associate in the Department of Child and Adolescent Psychiatry at Oxford University, and director of the DST/NRF Centre of Excellence in Human Development (CoE-HUMAN) at the University of the Witwatersrand (Wits).

And on 1 September 2015, the HSRC will welcome Professor Crain Soudien, deputy vice-chancellor at the University of Cape Town and joint professor in Education and African Studies, as the new CEO.

Soudien will be the third CEO to take charge of the organisation since 2000, when Dr Mark Orkin forcefully, and with great determination, restructured the organisation to become relevant to the needs of the country.

In reflecting on the achievements of two of his most successful appointments, Orkin said he looked for three qualities in a research leader: top-quality research, the ability to get funding for projects, and the relevance of their research. In all these, Shisana and Richter succeeded beyond all expectations.

'Of course, this required 14-hour days, six days a week, at which Olive and Linda have been unstinting. Whenever I sent out emails after midnight, I could be sure of an immediate live reply from Olive... and a reminder from Linda in the morning of what I had omitted! Withal, they were always cheerful, optimistic, collaborative, and supportive.'

Orkin and others pointed to Shisana's global reach, way beyond the HSRC, in setting up the Africa-wide Social Aspects of HIV/AIDS Research Alliance (SAHARA), chairing the South African BRICSThink Tank, the International Social Science Council, the forthcoming World Social Science Forum and, next year, the International AIDS Conference.

'Astonishingly, she sustained this active research leadership on taking over reins from me as CEO of the HSRC. That dual role had been quite beyond my capabilities. She developed an even greater international footprint, and locally drove her long-standing dream of a national health insurance system through to its uptake at last by the present minister. At the same time, she expanded the HSRC, increased its publications output, and massively improved the parliamentary grant.

On Richter: 'Linda, meanwhile, also had imperial ambitions; and in addition to extending her local and international research programmes and networks, set up an experimental surveillance site at Sweetwaters, to rival those of Wits and the University of KwaZulu-Natal (UKZN). Simultaneously, she maintained an astonishing annual slew of scientific publications, which now exceeds 150 papers and 100 chapters. After the renowned Bt20 (Birth to 20) cohort study – started well before she joined the HSRC – connected to four other such studies worldwide, Linda took over the reins of the consortium, and has led it to new heights, including innumerable *Lancet* articles.'

The HSRC wishes both women all the best in their new undertakings: Dr Shisana in starting a new venture and Prof. Richter with her responsibilities at the DST-NRF Centre of Excellence.

NEW CEO WELL SUITED TO STRENGTHEN RESEARCH AT THE HSRC

Professor Crain A Soudien has been appointed as the new Chief Executive Officer (CEO) of the HSRC from 1 September 2015. He is the former director of the School of Education at the University of Cape Town and the current deputy vice-chancellor at the same university, where he also holds a joint professorship in Education and African Studies.

Soudien has an excellent publishing record of over 180 articles, reviews, reports, and book chapters in the areas of social difference, culture, education policy, comparative education, educational change, public history and popular culture.

He has written two books, *Youth Identity in Contemporary South Africa: Race, Culture and Schooling* and *Realising the Dream: Unlearning the Logic of Race in the South African*

School; is the co-author of *Education Exclusion and Inclusion: Policy and Implementation in South Africa and India*, and is also the co-editor of four books.

Soudien, who obtained his education from the University of Cape Town, holds a PhD from the State University of New York in Buffalo.

Besides his academic activities he is involved in a number of local, national and international social and cultural organisations, and chairs the Independent Examinations Board. He is the former chair of the District Six Museum Foundation, a former President of the World Council of Comparative Education Societies, and was the chair of the Ministerial Committee on Transformation in Higher Education.

In a statement the HSRC Board said it was unanimous in the decision to appoint



Professor Soudien. 'His research and academic credentials and his managerial acumen are well suited to lead the strategic thrusts of the organisation, and building on past achievements he will strengthen research and development in the humanities and social sciences in South Africa, as well as research partnerships with other African countries,' the statement said.

SA WEBSITE FOR TRENDS IN MATHEMATICS AND SCIENCE

In May 2015, the HSRC's Education and Skills Development (ESD) programme launched a website for the South African Trends in International Mathematics and Science study (TIMSS SA). TIMSS is undertaken in more than 60 education systems around the world. South Africa has participated in four TIMSS studies at the Grade 8 or 9 levels over the past 20 years.

The aim of the TIMSS SA website is to highlight important education research being undertaken in South Africa, particularly in relation to school-level mathematics and science. The website also provides up-to-date information about the South African component of TIMSS, and will contribute to the discussion around critical education issues.

The website includes the latest publications based on TIMSS data, such as the recent national publication, *Beyond Benchmarks: What 20 years of TIMSS data tell us about South African Education*, as well as a series of policy briefs that addresses a range of issues,

including gender equity, school safety, school leadership and learners' attitudes to science.

Fast facts on the key findings from each round of TIMSS at the Grade 9 level in South Africa are also provided, and a monthly blog will stimulate discussion around important issues in education. In addition to TIMSS-related information, the website includes links

to other research on education within ESD.

In conjunction with the website, a monthly newsletter highlights new TIMSS-related publications and provides links to interesting information on the site as well as to the latest blog posts.

The TIMSS SA website can be found at: <http://www.timss-sa.org.za/>.

The South African component of the Trends in International Mathematics and Science study (TIMSS) has been assessing mathematics and science achievement among Grade 8 and 9 learners since 1995. In South Africa, TIMSS was conducted in 1995, 1999, 2002 and 2011, and the next round of TIMSS will be administered in 2015.

The new TIMSS Numeracy assessment has been designed to be administered at the Grade 4, 5 or 6 level to measure children's numeracy learning outcomes. TIMSS Numeracy was conducted for the first time in South Africa in 2014 at the Grade 5 level.



IMPACT OF THE JOURNAL *REGIONAL STUDIES*

The impact factor for the *Regional Studies* journal, of which Professor Ivan Turok, acting executive director of the HSRC's Economic Performance and Development research programme, is the editor-in-chief, has increased to 2 068.

Regional Studies is a leading international journal in theoretical development, empirical analysis and policy debate in the multi- and interdisciplinary field of regional studies. The journal invites established and upcoming scholars to submit agenda-setting work focusing on economic, environmental, political, and social

change aspects of regional (subnational) development and policy making. The journal is a central forum for debating the most recent results from research on regional development and policy making from an interdisciplinary perspective.

This increased impact factor means that *Regional Studies* is now in position 12 of the 76 journals reviewed in geography (up two positions from 2014), in position 23 of 100 journals reviewed in environmental studies (up two positions from 2014), and in position 41 of 333 journals reviewed in economics (up 14 positions from 2014).

HSRC RESEARCHERS AWARDED PRESTIGIOUS ELSEVIER TROPHY

An article, with Glenda Kruss of the HSRC as the main author, has been selected from thousands of recently published articles to be awarded the prestigious Elsevier Atlas trophy. Elsevier is a world-leading publisher and provider of information solutions for science, health and technology professionals.

Each month, an external advisory board selects a single Atlas article from published research from across Elsevier's 1 800 journals. The article, *Higher education and economic development: the importance of building technological capabilities*, was written by Kruss; Dr Simon McGrath, Professor of International Education and Development, University of Nottingham, and Drs Il-haam Petersen and Michael Gastrow of the HSRC.

According to the award letter, Atlas articles showcase research that can (or already has) significantly impact people's lives around the world. It is hoped that bringing wider attention to this research will go some way to ensuring its successful implementation.

Winning articles are hosted prominently on Elsevier.com, which is visited by almost three million people each month. The article by Kruss et al. is also freely available on ScienceDirect, Elsevier's full-text article database, to ensure it is accessible to all.

The abstract to the article says that higher education and development have not been priorities of global policy or research funding in recent decades. Yet, since the millennium, Southern governments have become believers in the global knowledge economy, and higher education enrolment growth has been phenomenal. The article offers an original account of how higher education institutions contribute to economic development by drawing on evolutionary economics and the national innovation systems approach. This offers distinct advantages in conceptualising higher education's developmental role, through its stress on the importance of education, skills,

work, innovation and production for economic development.

Using these concepts, the authors examine how well South African higher education is positioned to contribute to economic development through a consideration of two case studies.

The research was conducted under the Labour Market Intelligence Partnership, a research consortium led by the HSRC and funded by the Department of Higher Education and Training. The authors acknowledge the assistance of the large team of researchers that participated in the data-gathering and analysis process, as well as all those who participated in the case studies.



SEND-OFF FOR CEO OLIVE SHISANA



HSRC CEO Professor Olive Shisana is leaving the HSRC after 14 years, of which 10 years was spent at the helm of affairs. Taking leave took quite a few occasions. Herewith some photographs with the most memorable quotations from colleagues and friends of this extraordinary and inexhaustible leader, researcher and creative thinker.

What they said



Minister Naledi Pandor: 'She leads by example, playing a strong role in ensuring that the HSRC's policy advice to government was based on research, on evidence, and not on her political affiliations. She led the HSRC to focus on the wider issues in social sciences, broadening our understanding on how to respond in legislation and public policy.'



Director-general of Health, Precious Matsoso: 'Olive always starts a call with "you know what?" Then you know you are either in trouble or that she wanted to interest you in something'... 'She will phone you at 01:00 at night. I will hear the phone ring and still half asleep, not be sure whether I was dreaming. She would say: "Can you please look at page 3 and tell me what you think?" And I did not even have the document with me.'



Dr Botlhale Tema, member of the HSRC Board: 'She is like a laser beam. She goes to the heart of the matter under discussion'... 'No matter how heated an argument would get, Olive's temper would remain on an even keel and she would calmly steer us back to the agenda. I need a recipe from her on how to do that.'



Dr Nono Simelela, special advisor to the Chair of the South African National AIDS Council: 'To survive and be successful in the political environment one has to navigate and know when to step over the line and still take people with you. I have seen Olive take a seriously diplomatic role in meetings. People would walk into a room with fixed positions, and despite the abuse they throw at her, they would eventually agree and she would take them along on a path. I've seen her not losing her vision, staying in the moment, but also stepping back if something comes through, which she has not thought about.'



Professor Dan Ncayiyana, advisor to the CEO: 'She has an absolute loyalty to the HSRC and an incorruptible sense of fairness, but does not suffer fools gladly. You have to know what you're on about if you want Olive's attention and respect. She is a perfectionist and can cause discomfort for some, yet has a big heart and is caring and considerate.'



Professor Leickness Simbayi, long-suffering colleague and head of the HIV/AIDS, STIs and TB Programme at the HSRC: 'She is very hard working and a slave driver... Those of us who survived, appreciate her very much.' Pointing to the period of the first seminal study on HIV prevalence in 2002 and at the height of denialism, the team had to endure 'nasty criticism' following the shocking results of an 11% HIV infection rate, 'but we persevered and this is because Olive could show, "this is the evidence.'



Adieu Linda Richter

Professor Linda Richter, distinguished research fellow in the HSRC's HIV, STIs and TB programme, former executive director of the Child, Youth and Family Development programme and A-rated scientist, is leaving the HSRC after an outstanding service tenure of 15 years. Her long list of achievements include an honorary professorship in the Department of Paediatrics, University of the Witwatersrand (Wits); an honorary professorship in Psychology and a research fellow at the University of KwaZulu-Natal; a research associate in the Department of Child and Adolescent Psychiatry at Oxford University, and lately, appointed as director of the first Centre of Excellence (CoE) in Human Development at Wits. In this message to colleagues and friends, she sets out her plans for the future.

I've spent 15 very happy, very productive years at the HSRC. Wherever I have been, I have identified with, immersed myself in and been proud of the institution at which I have worked. This has been the case at the HSRC and pertains to my return to Wits, where I was a student in the late '60s and a visiting professor in Community Paediatrics in 1993 and 1994.

The DST-NRF Centre of Excellence (CoE) in Human Development which I am directing at Wits in collaboration with some of the best social and public health scientists in the country, is a big new challenge. This is the first CoE in the human and social studies. We are a virtual organisation, committed to inter-disciplinary and inter-institutional work. But we're up and running – fast – and in this, year two, we have had massive expansion in our funding, research and capacity development.

A lot has to be done this year. I chair a global group writing a three-part series on early child development for publication in *The Lancet* this year, and I'm a member of the committee organising the 9th World Congress for Developmental Origins of Health and Disease (DOHaD) in Cape Town in November – the first time the DOHaD conference (dohad2015.org) is being held in Africa.

The CoE-HUMAN is supporting two important parts of the conference. First, a special supplement of the *Journal of Developmental Origins of Health and Disease* titled *Developmental Origins of Health and Human Capital in Africa*, which I am co-editing with Professor Shane Norris from Wits. Secondly, the CoE is organising a satellite session on early child development in collaboration with the Academy of Science of South Africa (ASSAf) and sister academies in Africa. In this meeting, top global scientists and senior government officials from several African countries will consider the available evidence and discuss how to promote and protect early development as part of both short- and long-term investments

in health and human capital. Everyone knows I work hard and play hard too and to celebrate my 65th birthday in September, my partner Pat Smythe and I are going on a two-week cruise in the Mediterranean on the beautiful Queen Victoria.

I also have several large research projects on the go. Birth to Twenty Plus (Bt20+) is well into generation three, with the oldest child of our birth cohort turning 12. I'm involved in start-up and mature projects with colleagues both here and abroad on life course development, early childhood, and children and families affected by HIV.

I will miss the HSRC. But I realise that I am taking the things I most value with me – deep friendships and wonderful collegiality.

I have a number of goals for the next two years, including to maintain my NRF A-rating and to reach 250 peer-reviewed journal articles (50 to go) by 2017. I also intend writing a long-planned book on helping disadvantaged children in tribute to my late mentor and colleague, Karsten Hundeide, from the University of Oslo.

I will miss the HSRC. But I realise that I am taking the things I most value with me – deep friendships and wonderful collegiality. I will continue to work with and see people who mean the world to me. We have supported each other through difficult times, shared ideas and contributed unique talents to our joint work, and enjoyed celebrating our successes – all the things we most wish for in our work environment. ■



Structural inequality still characterises work in the mining sector

The South African mining sector has traditionally been a labour-intensive sector. However, to keep abreast with global competition, there has been an increase in the shift towards mechanisation and automation – a shift that holds implications for the skill and competency requirements in this sector, write *Angelique Wildschut* and *Tamlynn Meyer*.

The shift towards mechanisation and automation in the mining sector is having an impact on the demand for different occupational groups. There are those who anticipate the increasing employment of high-skill workers, while some assert that intermediate-level skilled labour will be negatively affected by the introduction of technologies operated by semi-skilled or unskilled workers (de-skilling).

growing trend to employ higher- (professional) and lower-level (clerks and elementary) occupational categories. Table 1 shows that there was also an increase in intermediate-level occupations, but this growth was much slower in comparison. These trends would support both the high-skill and de-skilling hypotheses.

The mining sector suffers from a history of inequality and instability.

The mining sector plays a significant role in the labour market, both in terms of employment and revenue generation, but it suffers from a history of inequality and instability that have a negative effect on investment and growth. This volatility was recently highlighted by strike action that not only spanned an extended period of time, but was also violent in nature. In this regard it is clear that an important future research area will be to better understand the sociological drivers of labour market change, which is increasingly acknowledged as having critical implications for our country's economy.

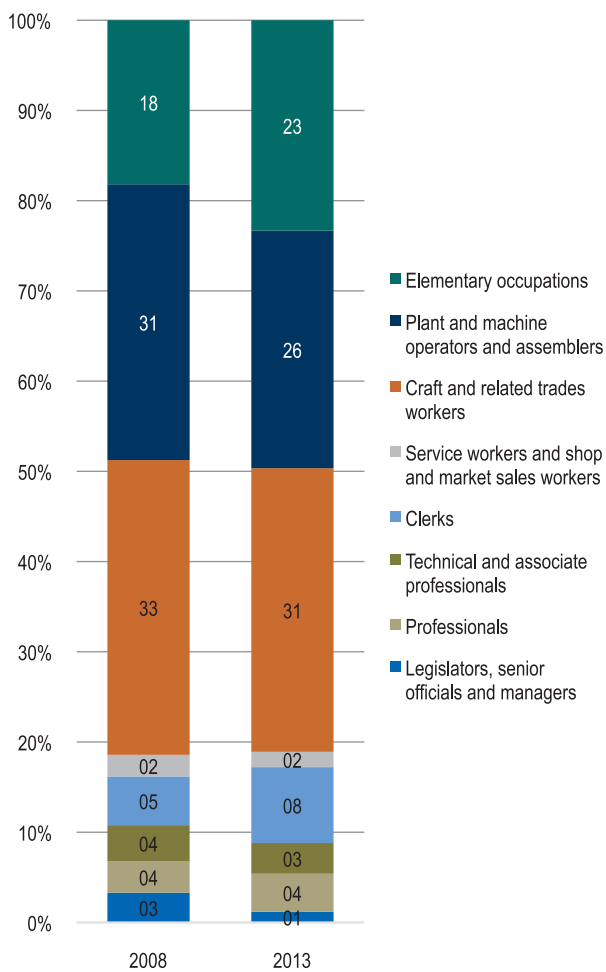
Data from a recent study by Wildschut et al. on artisanal occupational milieus and identities indicated there was a

Table 1: Employment according to major occupations in the mining sector (2008–2013?)

Main occupations	Average annual growth rate 2008–2013 (%)
Legislators, senior officials and managers	-11.9
Service workers and shop and market sales workers	-2.4
Technical and associate professionals	0.5
Plant and machine operators and assemblers	1.0
Craft and related trades workers	3.4
Professionals	6.9
Elementary occupation	8.0
Clerks	11.8
Total	3.6

Source: HSRC 2014

Figure 1: Employment according to major occupations in the mining sector (2014)



Source: HSRC 2014

The sector's history dictates unequal relations between occupation groups based on gender and race.

Unequal relations between occupational groups

The trend towards increased employment of high-skill occupations, as opposed to intermediate-level skills, deserves some attention. This is not necessarily a problem, but the relation between high- and mid-level occupations has historically been contentious in the sector. Not only does a large earnings gap exist, but the sector's history dictates unequal relations between the two occupation groups, based on gender and race. Qualitative data reveals that this relationship continues to be characterised by racial and gender inequalities that contribute to the maintenance of occupational hierarchies.

Trends such as these have implications for labour relations in this sector. However, rather than reverting to the traditional characterisation of labour unrest relating mainly to wage disputes, it is time to elevate the discussion to other factors, namely how structural inequality perpetuated in the workplace can be better identified and addressed. Studies on occupational milieus and identities have the potential to do so in allowing for the examination of the underlying sociological drivers of labour market change – issues such as culture, discourse and work identities associated with a particular occupation.

The study illuminated structural inequalities between occupational groups in the sector.

Under such an overarching theme, the study on artisanal occupational milieus and identities focused on studying the nature and shifts in boundaries between occupational groups. Thus, in facilitating an exploration of not only the extent but also the nature of change in the demand and supply of skills, the study also illuminated structural inequalities between occupational groups in the sector. Consequently, rather than just identifying the location and existence of structural inequalities in the labour market, the study allowed a better understanding of the underlying factors that continue to drive structural inequalities between occupations. ■

Authors: Dr Angelique Wildschut, senior researcher/post-doctoral fellow, Education and Skills Development (ESD) programme, HSRC; Tamlynne Meyer, junior researcher, ESD HSRC.





An overview: rights-related cases in the constitutional court

A study to assess the impact of the Constitutional Court and the Supreme Court of Appeal on society and the lived experiences of all South Africans, placed many aspects of our judicial system in the spotlight. *Narnia Bohler-Muller*, *Johan Viljoen* and *Marie Wentzel* report back on their analysis of constitution court statistics, collected for the years 2009 to 2013.

The Constitutional Court (CC) of South Africa has had a profound impact on the interpretation, protection and enforcement of the principles contained in the constitution (1996). Human rights are given clear prominence, and feature in the constitution preamble with its stated intention of establishing 'a society based on democratic values, social justice and fundamental human rights'. Human rights are underpinned by the constitutional values of 'human dignity, the achievement of equality, and the advancement of human rights and freedoms'. Spelt out in detail, political, civil, cultural, environmental and socioeconomic rights occupy 35 sections in chapter 2 of the constitution.

Rights-based cases comprised 49.8% of the cases the court passed judgment on between 2006 and 2013.

Strong rights-based track record

In South Africa, constitutional rights feature strongly in public and private discourse, with no hesitation to test the provisions, implications and limitations of the Bill of Rights by the state, communities and individuals. This was reflected in the CC's attention to rights-based cases, which comprised 49.8% (124 cases) of the 249 cases the court passed judgment on between 2006 and 2013. The remaining cases dealt with provisions found in other chapters of the constitution.

Using statistics, the authors constructed a table (Table 1) that portrays the types of rights-based cases adjudicated for the period 2006 to 2013. An analysis of these data provides interesting trends, and an indication of how the adjudication of rights-related cases has evolved over time.

Rights-based cases that dominated since 2006 included the right to equality (16 cases), dignity (15 cases), property (15 cases), a fair trial (14 cases), housing (14 cases), and just administrative action (14 cases).

The number of rights-based cases that remained fairly consistent throughout the duration of the period under review included those dealing with the right to equality, dignity and the right to property. The right to equality included the right to sexual orientation that led to, among others, the recognition of same-sex marriages many years before countries such as the US caught up.

Other-rights cases either increased in number, such as housing (with 2013 as exception), or decreased, such as the right to just administrative action. The housing cases mostly focused on the right not to be evicted. It seems there was a lack of implementation in this area, causing the increased number of cases dealing with the right to housing.

Categories of rights-based cases that featured prominently in the earlier part of the review period (2006–2009), but had not been referred to the CC during the latter part of the review (2010–2013), were the right to a healthy environment, the right to freedom and occupation, the right to remedy, and the right to sufficient water. This may suggest a trend of the government increasingly honouring its constitutional mandate to citizen's rights in these areas, for example, paying more attention to a healthy environment within the context of sustainable development.

The right to basic education [saw] a notable increase in cases in 2013.

Cases that featured more predominantly in the latter part of the period under review included the right to education, freedom of assembly, and freedom of association. The right to basic education in particular drew attention, with a notable increase in cases in 2013. Some commentators argue that nearly all legal disputes related to education in the past two decades seem to have been between provincial education departments and school governing bodies or teachers.

Interviews conducted as part of this study with former CC judges, sitting Supreme Court of Appeal (SCA) judges, advocates, attorneys and academics, revealed key views on why some rights (e.g. the right to food) were less litigated – or not litigated at all:

- The universal principles and approaches set out in earlier cases may have served to render litigation less necessary, or at least premature.

- Litigation tended to be a last resort. Because of the separation of powers doctrine, the CC wanted to see that concerted efforts had been made to engage with the parties.
- Litigation was complex and required careful planning; solid, convincing research; patient engagement with the responsible authorities, and careful timing. Undue haste could set back the cause by many years.
- Rights were often litigated in the lower courts, but because cases often did not reach the apex courts, the public might be less aware of them.
- Funding for NGOs and public interest litigation firms began drying up after the financial crisis of 2008.

The CC has continued to engage with rights-based matters over the years since its inception in 1995. It is generally accepted that social justice and transformation have been at the heart of judgments, although some believe the courts could adopt a more activist-based approach and push for a quicker pace of transformation where the state is lagging behind, while others feel comfortable with the wisdom and caution exercised by the CC in its adjudication of human rights within in the context of a constitutional democracy. ■

Table 1: Rights cases heard by the Constitutional Court for the period 2006–2013

Right	Section	2006	2007	2008	2009	2010	2011	2012	2013	Total
Access to court	34	1	5	2	2	1	1	-	-	12
Access to information	32	-	-	-	1	-	-	1	-	2
Children	28	-	2	-	2	-	1	2	2	9
Dignity	10	3	2	2	-	1	3	1	3	15
Education	29	-	-	-	1	-	1	-	3	5
Environment	24	-	2	-	-	-	-	-	-	2
Equality	9	3	2	4	1	2	1	-	3	16
Fair trial	35	3	2	3	1	-	2	1	2	14
Freedom of assembly, demonstration, picket and petition	17	-	-	-	-	-	-	1	1	2
Freedom of association	18	-	-	-	-	-	-	-	1	1
Freedom of expression	16	1	2	1	1	-	2	1	2	10
Freedom of trade, occupation	22	1	-	-	-	-	-	-	-	1
Freedom and security	12	3	2	1	-	3	1	1	2	13
Healthcare	27	-	-	-	-	1	-	1	-	2
Housing	26	-	-	1	4	-	5	3	1	14
Just administrative action	33	2	4	2	3	2	-	1	1	14
Labour relations	23	-	3	1	-	-	1	1	-	6
Life	11	1	-	-	-	-	-	1	-	2
Political	19	1	-	-	3	-	-	1	-	5
Privacy	14	1	1	-	-	-	-	-	3	5
Property	25	3	3	1	1	2	1	2	2	15
Remedy	38	-	-	-	-	1	-	-	-	1
Water	27	-	-	-	1	-	-	-	-	1
Total		23	30	18	21	13	19	18	26	

Source: HSRC 2015

Authors: Professor Narnia Bohler-Muller, deputy executive director, Democracy, Governance and Service Delivery (DGSD) programme, HSRC; Johan Viljoen, senior researcher, DGSD, HSRC, and Marie Wentzel, chief researcher, DGSD, HSRC.

The study was commissioned by the Department of Justice, and was conducted by the HSRC and the University of Fort Hare.



Civil society participation key to true sustainable development

With the 2015 deadline for the realisation of the Millennium Development Goals (MDGs) upon us, there is recognition for the fact that the commitment of UN member states to the MDGs heralded an unprecedented global effort towards addressing poverty. However, concerns over Africa's, and more specifically South Africa's, uneven (and at times poor) progress in meeting MDG targets have been widely noted, maintain *Shirin Motala et al.*

These concerns have focused the debate on what shape the post-2015 Sustainable Development Goals (SDGs) agenda should take and, more importantly, identifying the lessons learnt that must inform the transformational shifts required to deliver radical change in pursuit of the goal of ending extreme poverty by 2030. Fundamental change is thus called for.

A need for strong partnerships

The Millennium Declaration, ratified by 189 countries in 2000, emphasised the need for governments to develop strong partnerships with the private sector and civil society organisations (CSOs) in pursuit of attaining development and poverty eradication goals.

We conducted a scoping study on behalf of the National Development Agency (NDA) to assess the nature and extent of CSOs' engagement with the MDG processes in South Africa.

Through a desktop literature review and qualitative key informant interviews with CSOs and other relevant stakeholders, the study provided a cursory synopsis of the experiences of CSOs' engagement in MDGs in South Africa and importantly, in identifying mechanisms by which CSOs participation could be enhanced as the post-2015 agenda begins to take shape.

An overarching finding from the study was the acceptance that attainment of MDGs could not be realised by governments alone, but in partnership with CSOs. There was consensus that CSOs added value in articulating needs and aspirations of the poor; in filling crucial service delivery gaps,

and in modelling and innovating good practices. This was particularly relevant in the context of ensuring that MDGs were localised within the country context as a means of achieving national development priorities.

Creating an enabling environment for CSO engagement

Tom Fox and others of the International Institute for Environment and Development (IIED) USA identified five roles that government should fulfil to enable effective CSO engagement.

Mandating refers to the legal and regulatory environment within which CSOs operate. Government should play a facilitating role where it incentivises CSOs as service providers or easily provides information and in an acceptable format. Resourcing refers to the direct funding of CSO work. Partnering is where both parties gain mutual benefit through collaboration. Endorsing refers to actions by government that recognise the contribution of CSOs, one such example is the work of the NDA in supporting CSOs through grant funding, training and capacity building.

Effective consultative processes were continuous rather than episodic, and interactive rather than linear.

The desktop study pointed to the Zambian Civil Society for Poverty Reduction's (CSPR) CSO engagement process as a potential model for CSO engagement in that it demonstrated that an effective consultative process was continuous rather than episodic, and that it needed to be interactive and iterative rather than linear. In Zambia's experience, this reportedly facilitated greater transparency and accountability in public policy-making on poverty.

Global practices in the preparation of country reports revealed fairly divergent experiences, with CSOs being core members of report drafting teams from the outset in some countries, while in other instances they were invited to provide briefings to the drafters of the report. It was generally noted that the process that unfolded was more often a top-down approach, mainly aimed at ensuring that CSOs were informed of the process but not actively encouraged or enabled to participate directly.

CSOs driving MDG participation

The study findings showed that CSOs' engagement with MDGs processes in South Africa had been generally poorly co-ordinated. Where there had been significant CSO participation in MDGs, it appeared to have been largely driven by the CSOs themselves.

The 2010 MDG Country Progress Report noted that while the process of drafting the report had been widely designed to be consultative, the reality was that the process was largely led by government with sporadic CSO participation.

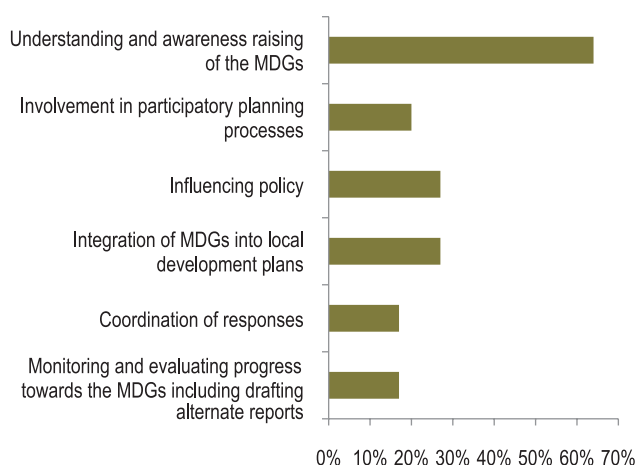
This serious limitation was subsequently addressed following a briefing session that President Zuma held with CSOs and an MDG summit convened by CSOs, with resolutions and recommendations from CSOs being incorporated into the 2010 report.

Strengthening CSO engagement with MDGs requires the political will of government.

Strengthening CSO engagement with MDGs requires the political will of government. This is a challenge, particularly when the relationship between government and CSOs is complex and often adversarial, and with the recognition of the vast differentials in power that exist between the state and CSOs.

As seen in Figure 1, more than 60% of the CSOs surveyed reflected a high level of awareness and understanding of the importance of MDGs. A total of 27% of the CSOs indicated their involvement in influencing policy and in the integration of MDGs into local development plans, and a little less than 20% had engaged in monitoring and evaluating progress on the MDGs, including participation in the drafting of MDG country reports.

Figure 1: Aspects of MDG processes in which CSOs were involved



Source: HSRC 2014

Towards enhanced CSO engagement

Two key recommendations that emerged from the study as means for strengthening CSOs' engagements with MDGs and in developing processes in the post-2015 agenda were:

- The establishment of a CSO co-ordination body to promote stakeholder engagement on MDGs to enabling effective participation.
- The mobilisation by government of resources for CSOs to effectively contribute towards MDGs beyond an implementation role, towards influencing the policy and design of interventions and monitoring MDG progress.

These recommendations resonate with those that emerged from an international consultation held in November 2014 where the HSRC participated in a conference on *Citizens' Participation and Inequality: Beyond 2015*. This international conference brought together approximately 200 civil society representatives in Copenhagen with the objective of taking stock of the post-2015 agenda and the global goals for sustainable development, and with developing recommendations for fostering enhanced citizen participation in the SDGs agenda after 2015.

Equality was at the core of the key recommendations from the conference. A call was made for a strong commitment to tackling inequalities through the post-2015 agenda by addressing inequalities through the lens of CSO participation, specifically:

- Governments and the United Nations should create an enabling environment for the inclusive participation and meaningful engagement of all CSOs and citizens in decision making, implementation, monitoring and accountability, to address the inequality of the realisation of civil and political rights.
- A global participatory monitoring and feedback network

should be formed to ensure input and feedback from all citizens, especially the most marginalised.

- There should be a peer review mechanism to monitor implementation of the SDGs.

The implementation of these proposals would be particularly crucial for engagement and participation in the development processes in the post-2015 agenda. Only by engaging citizens in the formulation, implementation and monitoring of goals and targets will the post-2015 agenda result in equitable sustainable development. ■

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The article reports on a study conducted for the National Development Agency aimed at understanding the relevance and contribution of CSOs in South Africa to the realisation of the MDGs' targets. The full report is available on www.hsrc.ac.za: Civil Society Organisations' engagement in the Millennium Development Goal processes in South Africa.

Hearing the voices of the poor: the state of poverty in three provinces

With a population of approximately 54 million people, Statistics South Africa (2014) reports that about 12 million people live in extreme poverty in South Africa, meaning they survive on R335 per person per month. *Evans Mupela et al* report on a study to profile the state of poverty and its manifestations within communities in South Africa, commissioned by the National Development Agency (NDA).

The study involved a desktop-based assessment of poverty, followed by a participatory element that explored the perceptions of the poor in three of the poorest provinces in South Africa, i.e. Eastern Cape, KwaZulu-Natal and Limpopo.

The participatory element, or qualitative aspect, was aimed at understanding poor people's perceptions of the multidimensional nature of poverty. Understanding poor people's perceptions of poverty, rooted in their experiences, is a key component of developing effective poverty-reduction strategies.

The authors selected a small group of people living in poverty, who were beneficiaries of NDA-funded development intervention projects located in the three provinces, namely Vukuzenzele Weaving and the Zamokuphila Piggery Farming Co-operative in the Eastern Cape (EC), Asisukume Msinga Agricultural Co-operative in KwaZulu-Natal (KZN) and RASEKO Agricultural Co-operative in Limpopo.

In each of the projects 15 participants were interviewed, representing men, women, youth, older people and a group of people living with disability.

Results

Defining poverty

The majority of the respondents linked poverty to unemployment, lack of income, lack of access to basic services of water and sanitation, shortage of food in the household, and lack of education.

The majority of respondents from KZN and Limpopo defined themselves as poor.

It is worth noting the differences between the ways in which respondents defined their own poverty situation. The majority of respondents from KZN (80%) and Limpopo (73%) defined themselves as poor while only 13% of EC respondents defined themselves as poor. This was despite the fact that the poverty incidences in all three provinces were very similar.

In Limpopo, poverty was perceived largely in relation to lack of basic necessities of water and sanitation, shortage of food, and lack of shelter. EC and KZN respondents predominantly focused their poverty perceptions on the lack of employment opportunities that could assist the household heads to generate income to provide sustenance for the household.

EC and KZN respondents focused their poverty perceptions on the lack of employment opportunities.

Education in relation to poverty

In all three provinces, project participants generally perceived the critical role of education in providing an escape route from poverty, with the commonly held view that access to education increased the chances of finding employment. Adult basic education and training (ABET) was recognised by some of the respondents as playing an important role in advancing education of adults in the communities.

Table 1 shows respondents' perceptions of the levels of education compared to the previous five years.

Table 1: Perceptions of levels of education compared to the previous five years (figures rounded off)

	Eastern Cape	KwaZulu-Natal	Limpopo
More educated	33%	73%	93%
Less educated	44%	7%	7%
No change	22%	20%	0

Household income sources

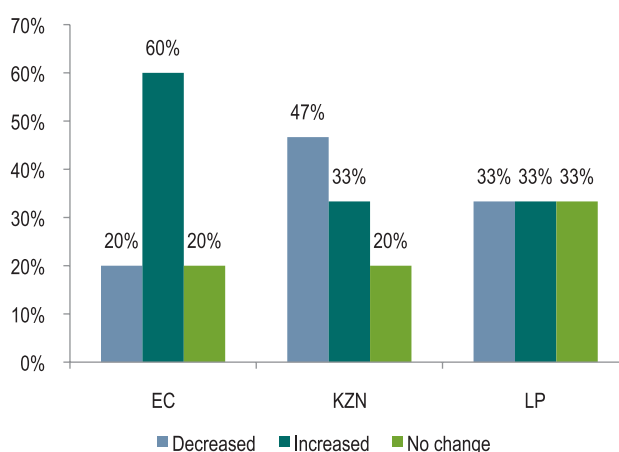
The respondents reported social grants as their main source of income. One fifth of households in the three provinces said they relied mainly on social grants. Employment from project-related work, such as the Expanded Public Works Programme and NDA-funded projects, were also cited as sources of wage income.

Unemployment in relation to poverty

The main types of employment opportunities reported by EC respondents were projects that absorbed unemployed people on a temporary basis and that had low entry-level requirements in terms of education and skills, such as farming, domestic work and the taxi industry.

In KZN and Limpopo, construction work was reported as the main source of employment among formally and informally employed people. The perceptions of change in unemployment levels in each of the three provinces varied. The majority of EC respondents reported unemployment had increased; in KZN the majority believed it had decreased, while in Limpopo respondents reported no perceived change in unemployment levels (Figure 1).

Figure 1: Perceptions of changes in unemployment levels, compared to the previous five years (figures rounded off)



Source: HSRC 2015

Physical health and well being were directly linked to poverty.

Health in relation to poverty

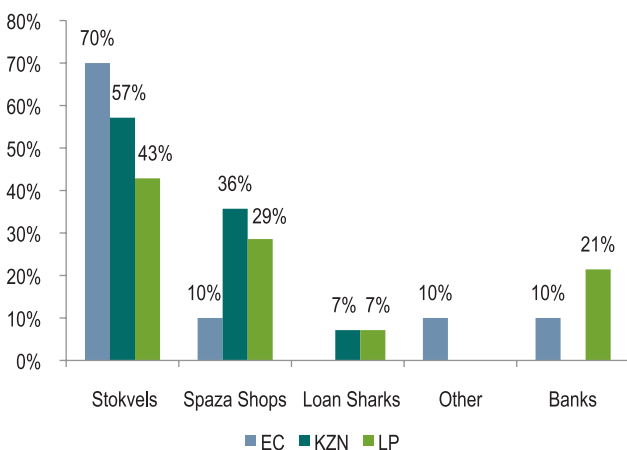
Physical health and well being were directly linked to poverty. Poor people were perceived to be more vulnerable to diseases. Chronic diseases, such as HIV/AIDS and high blood pressure were perceived to be more prevalent in the Eastern Cape. Access to health institutions remained a challenge for all respondents, particularly as they resided in remote rural areas located far from health facilities. Access was described not merely in terms of physical proximity to a healthcare institution, but also in terms of the lack of ambulances to transport a sick person to a health facility. It was also expressed as a lack of medication at these facilities. A very important concern was the devastating effect on the household when the head of household was 'unhealthy'.



Savings and credit in relation to poverty

The difficulty of saving and gaining access to credit were often mentioned as important aspects of poverty. Figure 2 shows that 'stokvels' were more popular in the Eastern Cape, while Spaza shops (an informal retail shop, usually run from home) were the source of credit for poor households in all three provinces. The respondents appeared to rely on this form of credit as an easier means of accessing food and other daily household necessities. Stokvels were favoured because households said they had access to credit and savings without the huge related costs of borrowing on high interest rates.

Figure 2: Most common savings and lending practices



Source: HSRC 2015

Access to land and agriculture services

The majority of the respondents reported that access to land was important as it enabled them to grow their own food. In the Eastern Cape, respondents noted that affordability of land had an effect on poverty as most of them felt that land was too expensive to obtain from traditional councils.

In KwaZulu-Natal, respondents mentioned that laziness of household members and lack of farming inputs affected agricultural production.

In Limpopo, a lack of money and knowledge on how

to acquire land were perceived as the main obstacles to households engaging in subsistence farming. However, a few respondents noted with concern that in instances where households had access to land, it did not automatically translate into productive use of that land.

Poor education or no education at all were perceived to be key determinants of poverty.

Concluding remarks

The overall impression from the study was that poor education or no education at all were perceived to be key determinants of poverty. This was linked to higher levels of unemployment as well. Participants noted the significant development interventions being implemented in South Africa that aim to reduce the poverty burden on poor households, and valued these interventions. These include social grants, public employment programmes, access to health, and other services and job creation initiatives being implemented by the government.

Furthermore, the study concluded that poor communities appeared to benefit most when resources were directly under their control or when they had significant opportunities to shape the manner in which these resources would be expended.

The challenge is for policy makers and community leaders to listen to these voices and implement measures in poor communities that will positively impact perceptions of their own poverty status, which is inextricably linked to their lived experiences of poverty in their neighbourhoods. ■

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Social audits: powerful community tools to ensure government accountability



A core component of South Africa's constitution is the commitment to ensure public participation in governance, giving effect to a representative and participatory democratic state. But as the presidency's 15-year review in 2008 noted, there is an urgent need for strengthening innovative approaches to fostering participatory democracy. *Annette Verryn et al* report on a case study that illustrates the challenges for communities in ensuring government accountability and responsiveness.

The urgency in addressing this democratic deficit is underlined by the increasing number of service delivery protests countrywide, which have escalated in both intensity as well as in the level of violence exhibited, over the last decade. Unfortunately, public protests about service delivery, labour strikes, and service delivery protest have been some of the most visible indicators of active citizenship in the last 20 years.

During 2015, the HSRC undertook a countrywide study on behalf of the National Development Agency (NDA) aimed at profiling innovative approaches employed by civil society to strengthen citizen engagement in development. One of the initiatives profiled was a social audit undertaken by community members of the Social Justice Coalition (SJC) in Khayelitsha, Cape Town. This case study illustrates the challenges for communities in ensuring government accountability and responsiveness.

Understanding active citizen engagement

Citizen engagement is essentially a process where citizens claim the right to participate in informing decisions that affect their lives and well being. Importantly, it entails the redistribution of power from the state to citizens as a core element of a democratic governance system. It includes political action, community activism, mutual respect,

nonviolence and democracy in practice. There is compelling evidence of the development gains to be achieved through enhancing active citizenship, foremost of which is its contribution to deepening democracy.

Social audits represent one form of peaceful action aimed at raising awareness of state failures.

There are distinct ways in which citizens seek accountability from the state. One is through exercising political power through the ballot box, what Anuradha Joshi of the UK Institute of Development Studies calls the 'long route' of accountability. The 'shorter route' is where citizens directly engage with frontline service providers. Social audits represent one form of peaceful action aimed at raising awareness of state failures.

A social audit, according to the framework of the Department of Performance Monitoring and Evaluation, is a

process through which organisational or project information is collected, analysed and publicly shared, and investigative findings are publicly shared and discussed. Through participation in the social audit process, communities develop an understanding of the issue, learn how to measure the problem, verify evidence and find ways to communicate the findings. Importantly, in this 'research' process, community members are not passive recipients of evidence, but generators of evidence as well as advocates attempting to address the problem.

Social audit of sanitation in Khayelitsha

For years, sanitation has remained a pivotal issue on the political landscape of the Western Cape. In 2012, SJC, a non-profit mass-based advocacy organisation operating in Khayelitsha, successfully campaigned for the introduction of a janitorial service in Khayelitsha in respect of the communal flush toilets that were in various states of disrepair. In response, the City of Cape Town outsourced the provision and servicing of portable toilets to Mshengu, a private service contractor. Despite this development, Khayelitsha residents continued to experience problems with sanitation.

In response to the growing frustrations of the community, the SJC launched the Clean and Safe Toilets campaign, aimed at pressurising the government to fulfil its obligations while at the same time mobilising the community to take a leadership role in addressing the issue. The campaign was a partnership between SJC and Ndifuna Ukwazi (NU), a group of activists for justice and equality, headed by Zackie Achmat, which uses research and litigation in its social justice campaigns. One of the challenges it faced was the lack of empirical evidence of the scale and nature of the problem.

The SJC undertook a social audit to generate data by mobilising a team of 90 residents, independent observers and other civil society partners in July 2014 to conduct the audit across four informal settlements in Khayelitsha, namely BM section, PJS, Nkanini and BT section. The audit involved interviews with janitors and residents as well as physical inspections of the toilets. Photo-documentary evidence was collected together with more than 800 completed questionnaires.

A number of significant findings came out of the audit:

- While the City of Cape Town contract with Mshengu indicated that 346 toilets would be delivered, the audit found only 256 (73%) toilets had been delivered;
- While the ratio of families to toilets was expected to be five, in reality 26 families used one toilet (more than five times the ratio envisaged);
- While more than three quarters of janitors indicated that they worked during weekends, residents reported that only a third of janitors worked during weekends;
- 68% of the toilets were clean at the time of the inspection;
- 26% of the toilets were not in working condition, the common reasons being no water, could not flush, were blocked or had no sewage pipe;
- Just more than half of the janitors (52%) had the requisite tools and equipment to keep the toilets clean. This included brooms, bin bags, chemicals, brushes and buckets.

To disseminate the findings of the audit, a public hearing was convened and attended by more than 400 residents and a range of stakeholders, including local government representatives; Western Cape Premier, Helen Zille, and a representative from the presidency and the media.

A key outcome of the public hearing was that the City of Cape Town questioned the legitimacy of the findings as it felt that the audit was not objective, the methodology was unreliable, and the sample size not representative. Although City of Cape Town councillor, Ernest Sonnenberg, committed to returning to the community to respond to and discuss the full report, there was no evidence of this happening at the time the study was undertaken.

Social audits appear to be an important instrument for data collection and community mobilisation.

Lessons learnt from the active citizen engagement


The case study brings to the fore a number of lessons in respect of enhancing active citizen engagement. These include:

- Advocacy demands must be backed by empirical evidence; social audits appear to be an important instrument for data collection, as well as for community mobilisation.
- Engaging community members as enablers and facilitators reinforces the notion of community-based and community-driven development, and abandons the historical parachute approach to community development.
- Interventions must be designed to take into account the specific context. Hence, decisions about which mechanisms and what approaches to utilise must be firmly grounded in the reality of the current context. This includes taking account of who must be involved and how.
- Evidence in itself is not a sufficient guarantee that the state will be pressurised to act appropriately. The partnership between NU and SJC, for example, provided the City of Cape Town with ammunition to dismiss the evidence and the campaign as being politically driven and attention seeking. ■

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This article is based on a study undertaken by the HSRC on behalf of the NDA. The full report, Enhancing Active Citizenry Engagement in South Africa (2015), is available on www.hsrc.ac.za.

The authors acknowledge the financial support of the NDA in respect of the study on which this article draws. The views expressed are those of the authors and do not necessarily reflect the views of any other party.



Myths and realities of informal settlements: poverty traps or ladders?

Swelling informal settlements are among the country's greatest social challenges. Shack dwellers are exposed to squalor and insecurity from living on unserviced and unauthorised land, which is a source of escalating frustration and angry protest. A coherent policy informed by whether these places serve a useful wider function is urgently needed, writes *Ivan Turok*.

Almost one in five residents of South African cities lives in a shack. Most shacks are densely clustered in informal settlements. Shack dwellers are vulnerable to hardship and environmental hazards from overcrowding on poorly-serviced and often unsuitable sites. Pressure for land means these areas are intensely contested, and as such they are at the forefront of growing social discontent and violent protests, since people believe they are being denied fundamental rights.

The government at all levels is ambivalent about informal settlements.

The government at all levels is ambivalent about informal settlements. In the absence of a clear and consistent national or local policy, there are many piecemeal responses to this issue, ranging from small upgrade projects and disaster relief schemes to forcible evictions. The wholesale clearance by the South African National Roads Agency Limited (SANRAL) of 800 people from Lwandle, outside Cape Town in June 2014

was an example of the government's heavy-handed response, subsequently declared illegal by the courts.

Shacks and social mobility

Part of the problem is a lack of knowledge about the impact of shack settlements on social mobility. There is little understanding of whether the sacrifices households make by living in unsanitary and insecure conditions pay off economically, and if they help or hinder human progress. In the absence of systematic evidence of the effects of informal settlements, implicit assumptions and myths flourish. This is not a sound basis for making policy.

A popular stereotype is that these are isolated enclaves occupied by illegal squatters who are anti-social, uneducated and desperate. Opportunistic 'queue jumping' is often said to be the motive; people select hazardous sites to invade to leapfrog others on the waiting list for free housing.

This caricature is far too narrow to understand the real dynamics at work. A better policy requires framing the issue in a way that covers the relationship between informal settlements, household motivations and urban labour markets. These processes can be summarised into two contrasting perspectives, namely informal settlements as ladders out of poverty, or as poverty traps (Table 1). Reality on the ground is likely to be a combination of the two.

Table 1: Contrasting perspectives on the role of informal settlements

	Ladder out of poverty	Poverty trap
People and community	<p>People migrate to urban areas with high hopes, resourcefulness and determination.</p> <p>Social networks support individual endeavour and enterprise, leading to enhanced human capital.</p>	<p>People migrate to urban areas under duress. Lacking education and skills, they are at the back of the jobs queue.</p> <p>Shack dwellers struggle to progress beyond dead-end, precarious jobs.</p>
Place and location	<p>Informal settlements are well located. Shelter is affordable and appropriate for low incomes.</p> <p>Hence these places function as low-cost gateways to economic opportunity.</p>	<p>Informal settlements are on marginal, unauthorised land, exposed to hazards.</p> <p>Insecurities and vulnerabilities limit people's attachment to the place and discourage investment.</p>
Economy and investment	<p>Increased labour supply reinforces agglomeration economies, which boosts growth and filters through to more jobs.</p> <p>Aspiring entrepreneurs generate energy, creativity and dynamism.</p>	<p>The surfeit of low-skilled labour does not spur additional job creation because of the skills mismatch.</p> <p>Employers and investors discriminate against shack settlements and residents.</p>

Source: HSRC 2015

Informal settlements lift rural households out of poverty and onto a path to urban opportunities.

Ladders out of poverty

In this view, informal settlements are transitory phenomena. They lift rural households out of poverty and onto a path to urban opportunities. They are affordable entry points into city economies where migrants obtain information, skills and contacts, with many advancing upwards and outwards to superior accommodation in better neighbourhoods.

Maintaining the substandard character of these reception areas helps contain the cost of living for workers with low-paid, entry-level jobs. People sacrifice poor living conditions to enhance their economic standing while acquiring new skills. People moving to shacks are motivated, tenacious and resourceful. They do so out of choice rather than compulsion, and in response to a labour market that signals higher demand in urban areas.

Living in the city gives people more hope than in the countryside because the opportunities are superior. Aspirations for a better life spur a stronger sense of purpose to overcome hurdles to personal advancement. Without the traditional sources of security in extended families and subsistence farms to fall back on, people are forced to help each other by building social networks.

Informal settlements also encourage people to generate their own livelihoods by giving aspiring entrepreneurs new-found confidence and capabilities. Informal enterprises benefit from cheap premises, local social networks and the lack of red tape.

The government's main role should be to enable people to migrate towards urban opportunities. This means self-help, incremental upgrading and providing basic services. Further improvements would raise living costs and prohibit

in-migration. The state should invest in people and let them choose how they live, recognising that shacks may be the only affordable way for them to gain access to the cities. It should encourage organic upgrading in sync with rising household incomes to avoid displacing poor families.

Some eke out a living scavenging garbage on landfill sites, recycling waste or collecting wood to sell on the roadside.

Poverty traps

The alternative perspective is far less sanguine about the role of shack areas in human development. They are seen as perpetual features of the urban landscape that demonstrate low social mobility. Urban labour and land markets do not adjust smoothly, and self-reliance is no match for the barriers that impede human progress.

People move to shack areas under duress, prompted by rural insecurity. Lacking the skills that employers expect, they end up at the back of the queue for jobs. Their best chances are for the lowest-paid, least desirable positions, where they tend to get stuck. Some eke out a living scavenging garbage on landfill sites, recycling waste, keeping small livestock or collecting wood to sell on the roadside.

Repeated job rejections sap morale, people detach from the world of work, and stress damages their subjective well being. Exposure to crime, violence and illness further undermines hopes and living conditions. Community cohesion is weakened by the strain on households, the competition for scarce resources, and the actions of gate-keepers who enrich themselves by extracting rents.

Shacks end up on marginal land exposed to the risk of storms, flooding, fire and disease. People suffer physical harm, psychological setbacks, disrupted livelihoods and lost property. Many behave as transient migrants, and remit any spare money to their families in rural areas.

Few shack dwellers advance onto the next rung of the housing ladder, and they only have access to second-class schools, healthcare and basic services, which dampen prospects of future generations. Shacks also burden the local tax base, because public service costs cannot be easily recovered.

Research is required to track whether households improve their economic status after moving into informal settlements.

Emerging findings

These perspectives have contrasting implications for government policy. The first suggests nurturing shack areas and investing in the people, while the second implies a more radical approach. Systematic research is required to assess which is most relevant to South Africa.

The author's preliminary analysis using the Labour Force Survey suggested a mixed picture, with an element of truth in both conceptions. There was some sign of progression out of poverty in that many shack dwellers had jobs, yet the extent of improvement was limited for the vast majority whose jobs were low paid and insecure. Moving to the city seemed to have helped rural migrants to access economic opportunities, but the quality was modest. Limited upward mobility could be a reason why there is so much frustration and social unrest in these communities.

Further research is required to track whether, over time, households improve their economic status after moving into informal settlements. Another objective is to identify those settlements in which cities have the greatest positive impact on people's prospects. A deeper understanding of the interactions between 'people' and 'place' is essential for more appropriate policies that support the upgrading of suitable settlements and the redevelopment of shack areas with serious locational problems. ■

Author: Professor Ivan Turok, acting executive director, Economic Performance and Development programme, HSRC.

This article is based on a paper written for the Research Project on Employment, Income Distribution and Inclusive Growth (REDI3X3) funded by the National Treasury.

HIV/AIDS awareness levels of TVET students

South Africa's technical and vocational education and training (TVET) sector comprises 50 colleges with a joint enrolment of some 658 000 students and a staff complement of about 16 000. *Geoffrey Setswe et al* report on a study to determine the level of HIV/AIDS and TB-related knowledge and attitudes of students and staff that could inform the design of HIV/AIDS and TB interventions in this sector.

The overall purpose of the Higher Education and Training HIV and AIDS (HEAIDS) programme is to reduce the threat of HIV/AIDS in the higher education sector and to mitigate its impact. In 2009, HEAIDS commissioned a pioneering study on HIV prevalence and knowledge, attitudes, behaviours and practices (KAPB) involving almost 24 000 students and staff at 21 of the country's 23 universities.

The 2014 national survey of knowledge, attitudes and behaviours (KAB) of students and staff at technical and vocational education and training (TVET) colleges (formerly known as FET colleges) was the first to be conducted in this sector to obtain baseline measures on KAB of HIV and AIDS and related risk factors.

Study methods

Data was collected from a representative sample of 5 651 students and 1 003 staff members, covering about 70% of campuses. The sample was sufficiently large and representative to allow findings to be generalised to staff and first-year students in the TVET sector.

A member of the research team read the questions to the class, with students completing their own questionnaires. Individuals in sampled classes were free to opt out of the survey but the rate of refusals was very low. Staff members who participated in the survey were sampled on an individual basis. They were either privately interviewed by a fieldworker who completed the questionnaire, or completed the questionnaire themselves.

Findings and discussion

Demographic profile

Male and female students were almost equally represented in the sample, about 88% of students were under the age of 25 years and more than three-quarters were from urban areas. Among staff members, nearly 54% were female, about 90% were 25 years or older, and the majority were urban dwellers. The racial composition of the two samples differed slightly (Table 1).

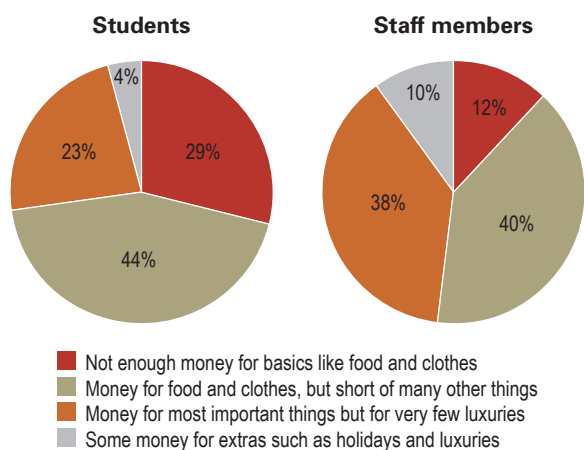
Table 1: Racial identity of students and staff at TVET colleges (figures rounded off)

Racial categories	Students (%)	Staff members (%)
African	89	77
White	5	12
Coloured	5	10

The survey cast some light on the financial circumstances of students and staff, indicating that students were in more constrained circumstances than staff (Figure 1).

Almost one in three students indicated they did not have enough money for food and clothing.

Figure 1:



Source: HSRC 2015

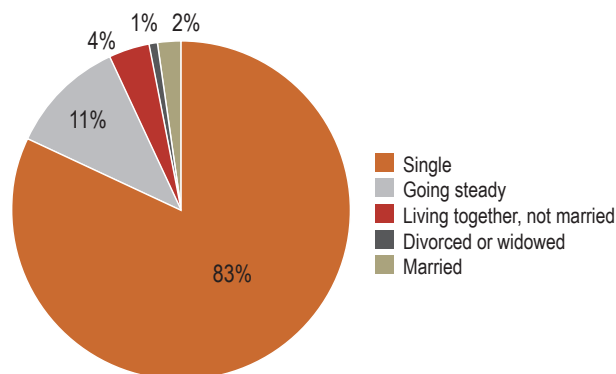
Almost one in three students indicated they did not have enough money for food and clothing, and a further 44% said they went short of other basic things, although could afford to buy food and clothes. Almost three quarters of students (74%) relied mainly on parents or family members for income, while about one in 10 indicated a bursary was their main source of finance.

About 8% of male students said they derived most of their income from a part-time job, compared to nearly 3% of female students. About 5% of female students relied on a partner or husband for income and another 5% on child support or a social grant. Male students were less likely to report being supported by a partner, spouse or social grant.

83% reported they were single, yet more than 60% later reported they had sexual partners.

The reported relationship status of students is shown in Figure 2. The striking feature was that 83% reported they were single, yet more than 60% later reported that they had sexual partners.

Figure 2:



Source: HSRC 2015

Information on living arrangements indicated that 51% of staff members lived with their husband or wife and 8% with their sexual partner, while 23% indicated they were in a relationship but did not cohabit. Table 2 shows the sample composition in terms of sexual orientation.

Table 2: Sexual orientation of students and staff members at TVET colleges (figures rounded off)

Sexual orientation	Students (%)	Staff members (%)
Heterosexual	83	87
Homosexual	7	5
Bisexual	5	4
Other	4	4

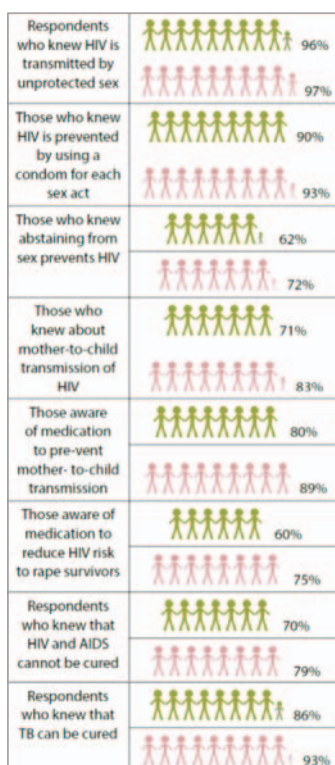
Awareness and knowledge of HIV/AIDS and TB

Staff members consistently showed higher awareness and knowledge of HIV, AIDS and TB compared to students. There was high awareness about sexual transmission of HIV and the preventative role of consistent condom use. Knowledge of mother-to-child transmission of HIV and antiretroviral (ARV) prevention was slightly lower than knowledge of sexual transmission. A surprising finding was that about 30% of students and about 19% of staff were not clear on the fact that AIDS could not be cured.

Staff mostly reported that they sourced information on HIV/AIDS from the mass media.

Staff mostly sourced information on HIV/AIDS from the mass media, including TV (68%), radio (59%) and newspapers (48%), and about half also got information from health facilities. Only one in five students obtained information from the media or health facilities, and even fewer from education institutions. Online and social media were not widely used by TVET students to access HIV/AIDS information.

Figure 3:



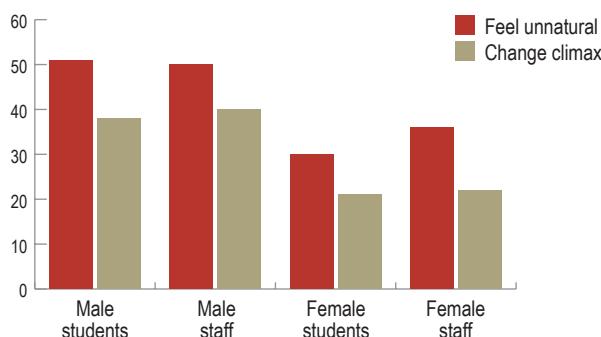
Source: HSRC 2015

Attitudes towards condoms and their use

Half of male respondents and a third of females said condoms felt unnatural (Figure 4). In addition, 38% of male students and 40% of male staff felt that condoms changed the sensation of orgasm. Female respondents were only half as likely to report this as their male peers.

A third of male respondents and one in five women said they only used a condom if their partner wanted this. Four in 10 male respondents said condoms should only be used when having sex with non-regular partners. One in four females shared this opinion.

Figure 4:



Source: HSRC 2015

Patterns of condom use

- Reported condom use at last sex with a (main) partner was 55% for students and 35% for staff.
- Condom use at last sex with a non-regular partner was around 75% for all respondents.
- Consistent condom use ('every time' or 'almost every time') was reported by 80% of students when having sex with their partner and by 74% when with a non-regular partner.
- The corresponding figures for staff members were 72% and 74% (Table 3).

Table 3: Consistency of condom use with partner and non-regular partner

Frequency of condom use	Partner (%)	Non-regular partner (%)	Partner (%)	Non-regular partner (%)
Every time	57	58	52	55
Almost every time	23	16	20	19
Sometimes	17	11	22	13
Never	2	6	4	9
Don't know	2	10	3	5

Rates of consistent condom use were considerably higher than those in the 2012 study.

Rates of condom use at last sex for students and staff were consistent with previous studies, including the 2012 HSRC household HIV prevalence survey and the HEAIDS 2010 study. However, reported rates of consistent condom use in this study were considerably higher than those in the 2012 study.


Conclusion

It is clear the students surveyed have acquired a fair amount of knowledge about HIV/AIDS, but some lack an appreciation of their personal risk for, and the relationship skills that would allow them to conduct their sex lives in a way that keeps them safe from, HIV, unwanted pregnancy and STIs. Staff were a step ahead of their students in terms of HIV knowledge, their active search for information, and more accepting views of HIV treatment, people living with HIV, and lesbian, gay, bisexual, transgender and intersex groups (LGBTI). More than half of staff members were married and living with their spouse; this may have contributed to their low perception of personal vulnerability to HIV.

The survey revealed relatively high levels of knowledge on HIV prevention methods, alongside negative attitudes to

condom use. The figures on self-reported condom use at last sex and on unplanned pregnancies indicated that a high proportion of students and staff engaged in unprotected sex with their regular sexual partner. But data on consistent or 'almost' consistent condom use painted a different picture, yielding the high rates of consistent condom use relative to other studies. The subjectivity of self-reporting on sexual behaviour might have influenced this result. ■

Authors: Professor Geoffrey Setswe, deputy executive director, HIV/AIDS, STIs and TB (HAST) programme, HSRC; Dr Musawenkosi Mabaso, senior research specialist, HAST, HSRC; Professor Sibusiso Sifunda, chief research specialist, HAST, HSRC; Ntombizodwa Mbelle, chief research manager, HAST, HSRC; Vincent Maduna, master's research intern, HAST, HSRC; Dr Jacqueline Mthembu post-doctoral research fellow, HAST, HSRC.



Drug-resistant TB treatment: concerns over absconding patients

A study in Khayelitsha in the Western Cape illustrated the difficulty of retaining patients on drug-resistant TB treatment, a tendency that poses a significant threat to containing the spread of multidrug-resistant TB in the country, writes *Sizulu Moyo*. That drug-resistant TB is increasing year-on-year is clear when analysing the number of multidrug-resistant TB cases.

Tuberculosis (TB) is one of the major causes of morbidity and mortality in South Africa, with 328 896 new and relapse cases reported in 2013, and an overall total of 380 000 prevalent cases in the country in the same year. Approximately 89 000 people died from TB in South Africa in 2013, of who 64 000 were also HIV positive.

A major concern in the country is the development of resistant strains of the bacteria that causes TB resulting in multidrug-resistant TB (DR-TB), which is more difficult and more expensive to treat and cure. Multidrug-resistant TB refers to cases of TB that are resistant to two of the most effective drugs used for treatment, isoniazid and rifampicin.

Drug-resistant TB is a significant threat to gains that have been made in the control of TB.

Drug-resistant TB is regarded as a significant threat to gains that have been made in the control of TB across the world. While the overall number of TB cases is slowly decreasing in South Africa, cases of drug-resistant TB are increasing, with a total of 10 085 laboratory confirmed cases in 2012, which rose to 26 023 cases in 2013, due both to better detection of cases and continuing transmission of the disease.

The control of drug-resistant TB relies on the detection, diagnosis and treatment of both drug-sensitive and drug-resistant cases to prevent transmission. Impediments in the control and management of drug-resistant TB include delays in detection and diagnosis, and the loss of patients from treatment, which means treatment is terminated prematurely.

In the past, detection of drug-resistant forms of TB could take days or weeks after submitting sputum specimens for

testing. Today, rapid diagnostic technology using Xpert MTB/RIF can make results available within two hours of testing.

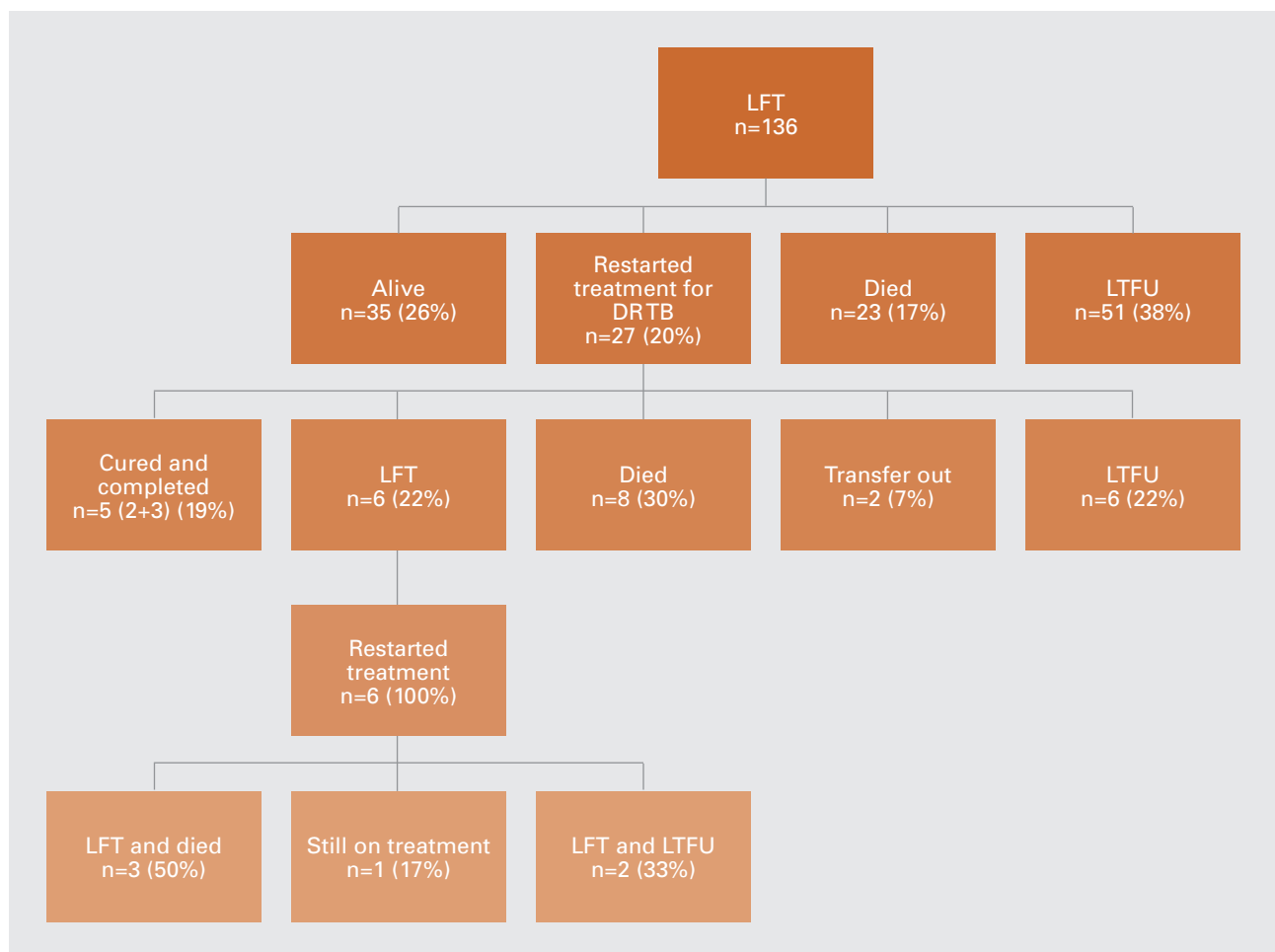
Khayelitsha: patients abandoning treatment

Patients who are lost from care and therefore do not complete treatment are of significant concern as they may continue to transmit TB in their communities. That is in addition to the many infected people who remain undiagnosed.

We analysed data on outcomes of patients who were diagnosed with drug-resistant TB in a community-based drug-resistant TB programme in Khayelitsha, Cape Town, over the period January 2009 to July 2011, assessing outcomes until July 2013.

Of the 452 patients included in our analysis, 215 patients (48%) were treated successfully. A total of 136 patients (30%) were lost from treatment (LFT), meaning they prematurely stopped taking treatment for a period of two or more consecutive months; 79 (17%) died while on treatment, and the remaining five patients (22%) experienced failure of treatment. Among the 136 patients who were lost from treatment, 27 (20%) were known to have returned to treatment again at some point (Figure 1).

Figure 1: Post treatment outcomes of patients lost from DR-TB treatment Khayelitsha, Cape Town (January 2009–July 2013)



LFT – lost from treatment: patients who prematurely stopped taking TB treatment for two or more consecutive months

LTFU – loss of follow up-patients who prematurely stopped taking TB treatment for two or more consecutive months and for whom there was no further information after their last known date of treatment.



TB patients visit the clinic daily to receive their medication and must take it under supervision. It is recommended that patients take their pills after meals.

Loss from treatment occurred from early in the treatment phase and persisted throughout the entire treatment period, with 67% of patients remaining on treatment 18 months after treatment initiation (treatment for drug-resistant TB is taken for 18-24 months). Loss was more common in younger patients (15-25 years old) and in males. Among patients who were successfully tracked after prematurely stopping treatment, 62% were alive after two years. Those who had taken treatment for a long period (>12 months), and those younger than 35 years were more likely to be alive at this time point.

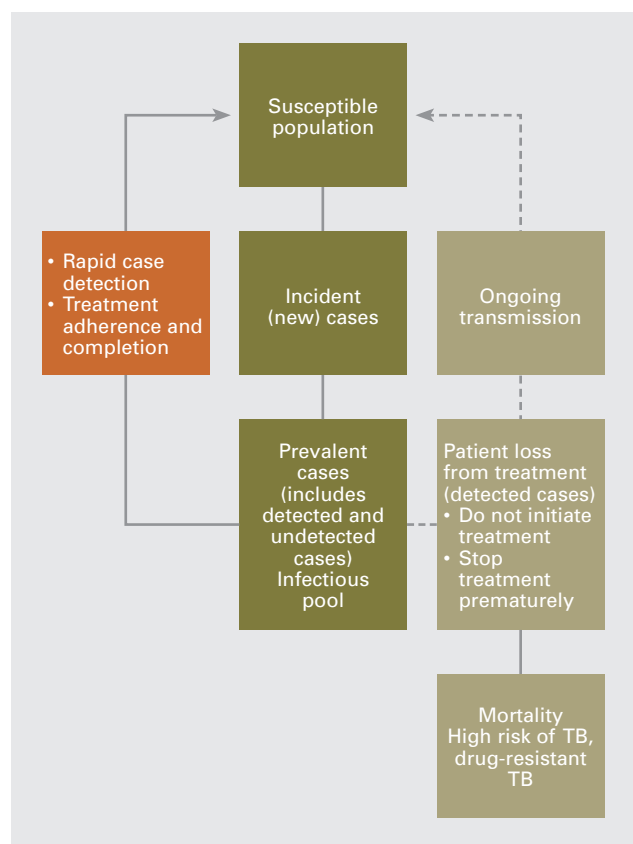
Loss from TB treatment is a problem common to many TB programmes around the world.

Loss from TB treatment is a problem common to many TB programmes around the world. However the losses observed in this setting where a high number of patients were initiated on treatment were higher than previously reported from other settings, including those in South Africa. Treatment for drug-resistant TB is particularly challenging due to the large number of tablets that have to be taken, their severe side effects, a painful injection that is part of the treatment regime, and the long duration of treatment.

Completion of treatment is a significant element in the fight against the spread of TB.

More research is needed to improve the drugs, shorten the treatment period and to support patients undergoing treatment. Completion of treatment is a significant element in the fight against the spread of TB. Figure 2 depicts the relationship between patient loss from treatment and i) poor outcomes (mortality, development of drug-resistant strains of TB and ii) continued spread of the disease.


Figure 2: Significance of patient loss from treatment



Author: Dr Sizulu Moyo is a chief research specialist in the HIV/AIDS, STIs and TB research programme, HSRC.

Acknowledgements: Médecins sans Frontières (MSF Doctors without Borders), Khayelitsha, Cape Town, South Africa. Dr Moyo worked as an epidemiologist at Médecins sans Frontières in 2013–2014. This analysis was approved by the University of Cape Town Research Ethics Committee.

This article is based on: Moyo S, Cox HS, Hughes J, Daniels J, Snyman L, De Azevedo V, Shroufi A, Cox V, Wilkinson L, Gilles van Cutsem. 'Loss from treatment for drug-resistant tuberculosis: risk factors and patient outcomes in a community-based program in Khayelitsha, South Africa'. PLoS ONE 10(3): e0118919.



How green is my valley? Perceptions and concerns for the environment

As the level of concern for the natural environment increases, more and more studies attempt to understand the intricate relationship between livelihood issues and environmental concerns. As evidence emerges, these studies increasingly point out that environmental matters are associated with complex economic and social processes, as this article by *Jaré Struwig, Ben Roberts* and *Steven Gordon* shows.

Data

In 2010, a module on public attitudes towards the environment and pro-environmental behaviour was included in the South African Social Attitudes Survey (SASAS). The inclusion of this module was part of the ongoing involvement of SASAS in the International Social Survey Programme (ISSP). For the purpose of the study, we interviewed 3 112 South Africans, 16 years and older.

Background

The way people view the environment depends, in part, on the material resources available to them. Evidence shows that individuals who are materially deprived are much less concerned about environmental protection. They are likely to place more emphasis on basic material needs (such as food and jobs) than on environmental issues. This previously widely accepted thesis has been recently supplemented by the environmental deprivation theory. This theory upholds that day-to-day survival is generally more important than environmental concern, but maintains that eventually it

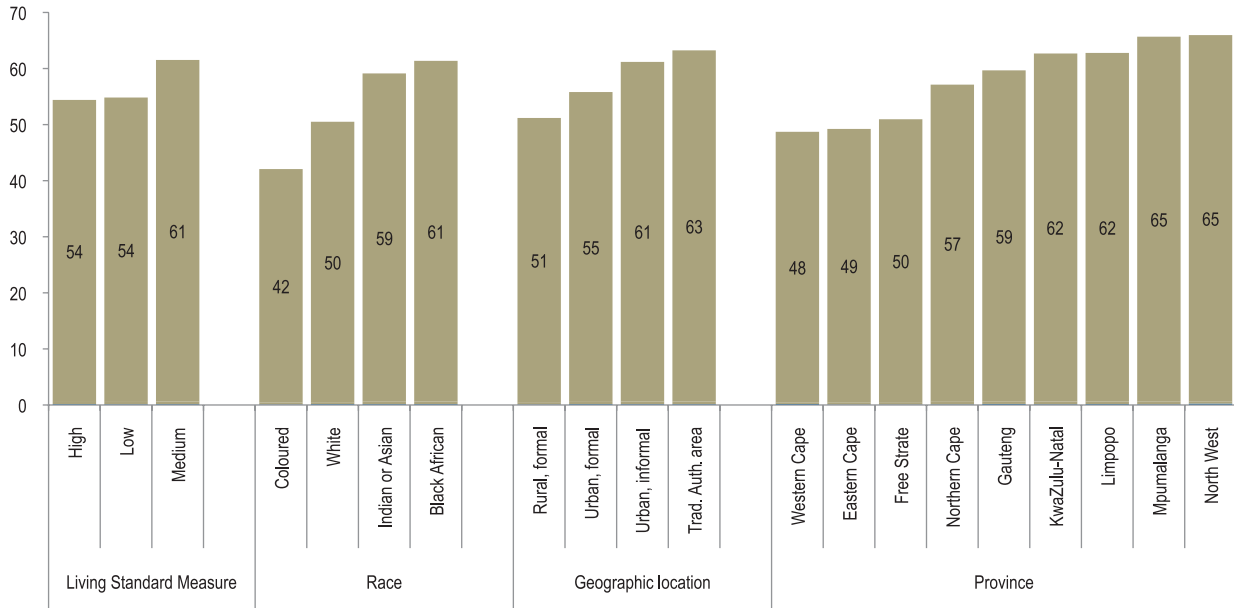
reaches a threshold, the so-called tipping point, which is crossed once the environment becomes so neglected and degraded, it is a survival concern in itself. Central to the theory is the proposal that the more someone is exposed to pollution (or other forms of environmental degradation), the greater their concern around environmental issues and the greater their dissatisfaction and the eventual public discontent.

Environmental problems that affect everyday life

On the question as to whether environmental problems had affected their daily lives, more than half of the respondents (58%) indicated that this was the case, with just less than a quarter feeling ambivalent (neither agreeing nor disagreeing). A minority (15%) disagreed with the statement, implying that environmental problems did not affect them.

Despite the government's commitment to building sustainable communities and embracing a human rights approach for all South Africans, the occurrence of environmental problems in South Africa was still polarised along racial and geographical boundaries (Figure 1 on page 26).

Figure 1: Agreement with the statement, 'environmental problems have a direct effect on my everyday life'



Source: South African Social Attitude Survey, 2010

Environmental problems most often selected were water shortage, water pollution, air pollution and household rubbish removal.

The subgroups most affected by environmental problems were black Africans, and people residing in traditional authority areas and urban informal areas. Interestingly, in terms of living standard, people with a medium living standard measure perceived themselves to be more affected by environmental problems than people with a low or high living standard.

People residing in the Western Cape were least affected by environmental problems while environmental problems

had the largest impact on people residing in the northern provinces, notably Mpumalanga and the North West.

To contextualise the environmental problems experienced by respondents, we asked what environmental problem most affected them and their family. The problems most often selected were water shortages (27%), water pollution (16%), air pollution (15%) and household rubbish removal (15%) (Table 1).

Less than a tenth of South Africans felt affected by issues such as climate change, the use of chemicals and pesticides, nuclear waste or genetically modified foods. Regardless of geographic area, water shortage was cited as the most common problem in all areas.

As could be expected, different geographical areas experienced environmental problems differently. Compared to residents of urban formal areas, those living in urban informal areas were more likely to experience problems with a water shortage, with almost half (48%) either reporting water shortages or water pollution.

Table 1: Exposure to environmental problems by geotype

	South Africa	Urban, formal	Urban, informal	Traditional Auth. areas	Rural, formal
Water shortage	27	18	30	46	23
Water pollution	16	15	18	17	22
Air pollution	15	17	20	10	13
Household rubbish removal	11	13	12	9	10
Climate change	8	10	3	6	4
Using up natural resources	3	3	4	2	1
Chemicals and pesticides	3	4	2	1	4
Nuclear waste	2	3	1	1	2
Genetically modified foods	2	3	1	1	1
None of these	9	10	7	7	14
Cannot choose	3	4	2	1	7

Source: South African Social Attitude Survey, 2010

People residing in rural areas often rely on small-scale farming and other survivalist informal economic activities to sustain themselves. They are particularly reliant on the environment and therefore vulnerable to certain types of environmental problems due to the nature of their livelihoods. So, not surprising, water shortages and water pollution were identified as the most common environmental problems in rural areas. In particular, almost half of people residing in traditional authority areas mentioned that water shortages affected their lives. Air pollution and climate change were far less commonly identified in rural areas than in urban areas.

Environmental concern was clearly related to whether a person experienced environmental problems that affected their daily lives.

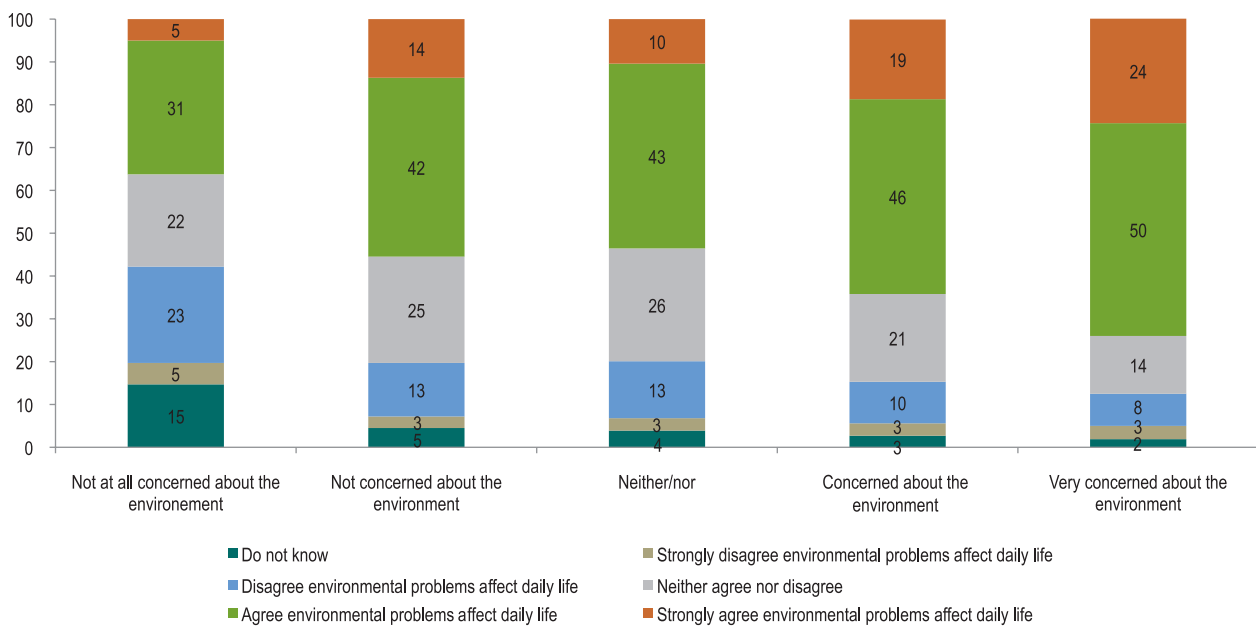
The relationship between environmental problems and environmental concerns

One of the dangers of environmental decay is that environmental degeneration can become so severe that it affects people’s livelihoods and communities start protesting. In this section we determined whether experiences of environmental problems impacted on environmental concerns. Concern for the environment was mostly interpreted in a positive way but as the deprivation theory suggests, this concern can become so severe and paramount that it becomes part of a public uproar and unrest.

As Figure 2 demonstrates, concern for the environment was clearly related to whether a person experienced environmental problems that affected their daily lives. Those who were ‘concerned about the environment’ or ‘very concerned about the environment’ were twice as likely to have stated environmental problems affected their daily lives.

Of those who were not at all concerned about the environment, only 36% agreed that they experienced environmental problems on a daily bases. This proportion incrementally increased to the extent that almost three quarters (74%) of people who were very concerned about the environment indicated that they experienced some form of environmental problem that had affected their daily lives.

Figure 2: Exposure to environmental problems and environmental concern



Source: South African Social Attitude Survey; 2010

Conclusion

Environmental problems are closely associated and interrelated with forms of social justice, and have the potential to become intensely political since they are entrenched in access to power and resources in society. South Africa remains polarised in terms of race and geographical areas when it comes to issues of environmental resources and problems experienced, yet social and environmental policies often operate in separate silos, as though they are not interrelated. The only way to

accommodate this is to inculcate a holistic approach into communities and to draw on concepts of environmental justice that emphasise the importance of linking the struggle against human and social injustice and the exploitation of humans with the struggle of the environment. ■

Authors: Jarè Struwig and Benjamin Roberts, co-ordinators of the South African Social Attitudes Survey (SASAS); Steven Gordon, PhD intern, Democracy, Governance and Service Delivery programme, HSRC.

The 'born free' generation and heritage tourism



Following the end of the apartheid system, the new democratic government declared a number of sites 'places of historic or cultural importance'. The goal was to encourage the public, particularly the youth, to visit sites of cultural or heritage significance. To measure the success of this initiative, *Steven Gordon*, *Jaré Struwig* and *Benjamin Roberts* examined public attitudes towards heritage tourism, focusing on the 'born free' generation.

Sites of major historical or cultural significance in South Africa, including former sites of apartheid and colonial oppression, were preserved as museums, for example, Robben Island. A number of museum complexes were also created, such as the Hector Pieterse Museum in Soweto, to remind present and future generations about the struggle against apartheid and racial segregation.

Provision was also made to celebrate and educate the public about the precolonial kingdoms of South Africa through the preservation of areas like Mapungubwe in the Mapungubwe National Park and the Ncome/Blood River Heritage site.

Commentators have often said that the so-called 'born free' generation – those born during the period 1990–1999 (between 16 and 25 at the time of the survey) – are not attracted to the past and that the future is what concerns them.

We wanted to investigate whether the 'born free' generation was apathetic towards the past and uninterested in visiting the numerous sites of major historical or cultural significance preserved by the government. For this purpose we analysed data from the 2014 round of the South African Social Attitudes Survey (SASAS), an annual cross-national opinion survey, based on a sample of 3 108 adults aged 16 years and older living in private homes.

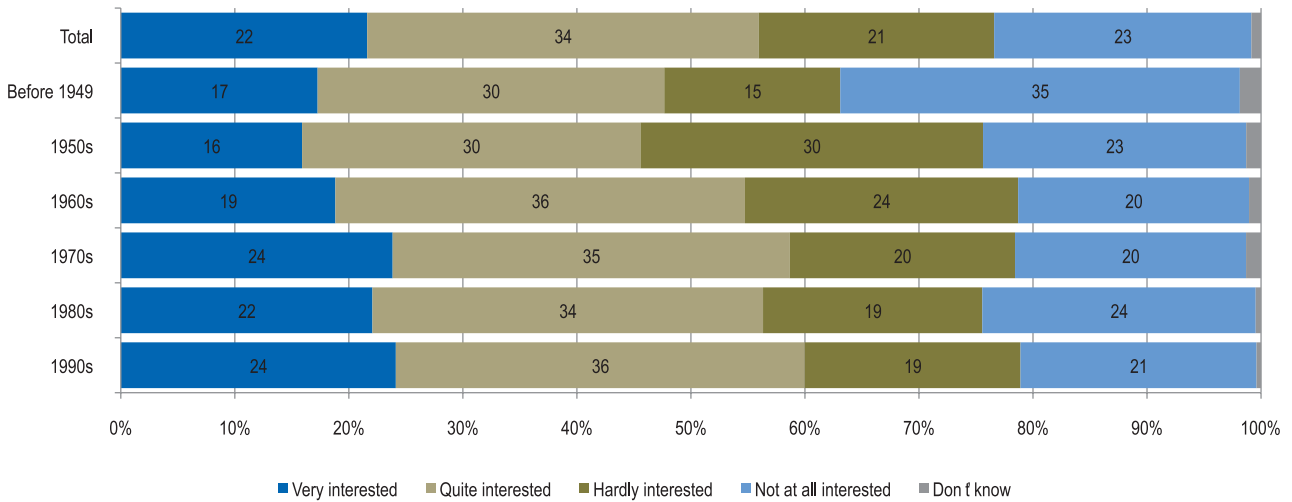
Remembering the past

The results from the SASAS 2014 round showed that the 16–25 age cohort expressed an interest in their heritage and would be amenable to visiting tourism sites of cultural or heritage significance. Of those born in the 1990s, more than three-fifths (61%) reported that they would be interested in visiting sites of cultural or heritage significance (Figure 1). This compared favourably with those born in the 1950s (56%) or before 1949 (57%).

More than 61% reported they would be interested in visiting sites of cultural or heritage significance.

Among the 16–25 age group, the vast majority (70%) were also eager to know more about our national culture and history. Young adults were, in fact, no less interested in learning more about the past than older South Africans.

Figure 1: Public Interest in visiting tourism sites of cultural or heritage significance

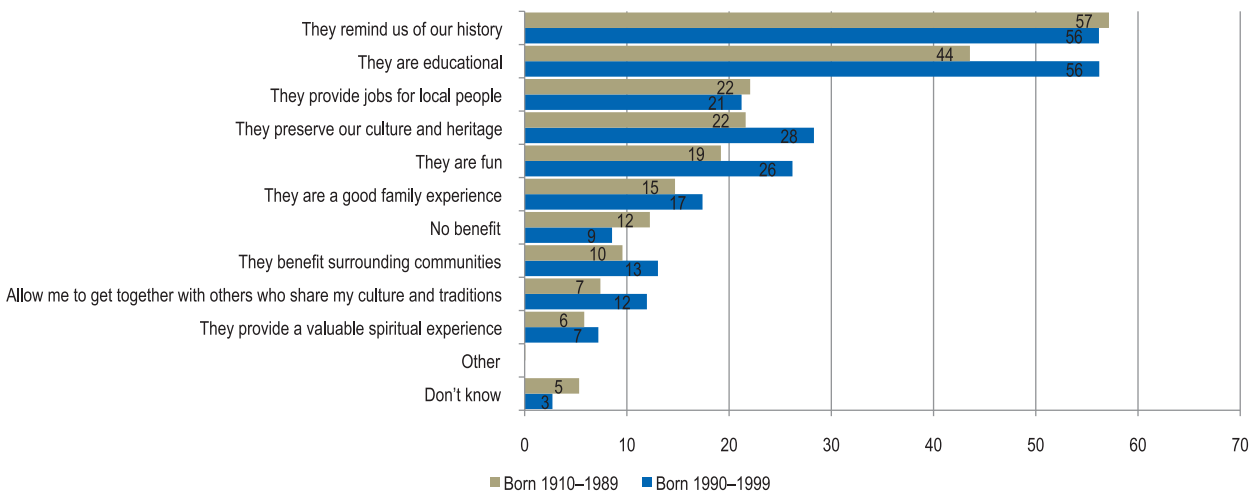


Source: HSRC SASAS 2014

In SASAS 2014, respondents were asked what benefits (if any) there were to visiting sites of cultural or heritage significance. Most members of the 'born free' generation were of the opinion that visiting such sites had advantages (Figure 2). Only a very small share (8%) said that visiting sites

of cultural or heritage significance had no benefit. The most commonly cited benefit was 'remind us of our history' and more than half (57%) reported this as a benefit. More of the 'born free' generation reported heritage sites as educational (57%) compared to those born before 1990 (47%).

Figure 2: Benefits of visiting tourism sites of cultural or heritage significance



Source: HSRC SASAS 2014

70% of all young adults agreed it was important that South Africans remembered the apartheid past.

This generation was clearly not indifferent about, or disinterested in, remembering the apartheid past. Approximately five-sevenths (70%) of all young adults agreed that it was important that South Africans remembered the

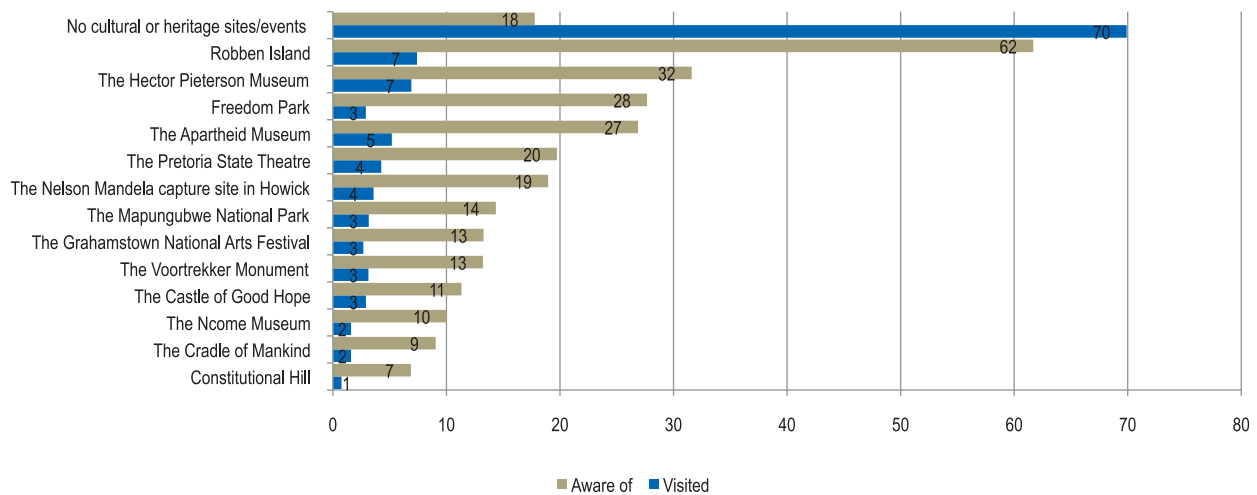
apartheid past. Less than a fifth (15%) disagreed, while the rest (16%) remained neutral. Again, this did not differ notably from those who lived during the apartheid era.

Visiting cultural or heritage sites

Many of those aged 16-25, however, had not been able to visit one of the country's many cultural or heritage sites (Figure 3). When asked which of a list of 13 major cultural or heritage sites/events they had visited, almost four-fifths (70%) of this group reported that they had not visited any of them.

The most commonly visited sites by those in the 16–25 age cohort were Robben Island (7%), the Hector Pieterse Museum (7%) and the Apartheid Museum (5%). Even more concerning was an apparent lack of awareness about sites of cultural or heritage significance. While more than three-fifths (62%) were aware of Robben Island, less than two-fifths (32%) were aware of the Hector Pieterse Museum and only two-sevenths were aware of the Freedom Park or the Apartheid Museum.

Figure 3: Awareness and visitation of tourism sites of cultural or heritage significance for the 16–25 age cohort



Source: HSRC SASAS 2014

Two-fifths of the older respondents reported that such sites were too expensive.

Acknowledging that many South Africans do not visit cultural and heritage sites, respondents were asked why they thought people did not visit such sites. Two-fifths (43%) of the older respondents reported that such sites were too expensive. Other common answers included no time to visit (33%) and a lack of knowledge about the sites (26%) – answers that did not differ much from those of the ‘born free’ generation.

Respondents were asked how likely they thought it was that they would visit a cultural or heritage site or attraction during their next holiday. More than two-fifths (43%) of those adults born after 1990 said that it was either not at all likely, or not very likely. About 38% reported that it was somewhat likely and only 16% that it was very likely. Older South Africans were even more likely to report that they would not be visiting a cultural or heritage site or attraction during their next holiday. Of those born before 1969, more than half (54%) reported that they would be unlikely to visit a heritage or cultural site during their next vacation.

Tourism and the economy

In South Africa, as in many other parts of the world, tourism is one of the fastest growing sectors of the economy. There is significant potential for future job creation in this sector,

particularly for the youth who often struggle to find employment in the tough South African labour market.

Positioned as a top priority sector in state planning and policy frameworks, tourism has been cited as key to meeting government promises on job creation. The public is supportive of this approach and many in the country believe that heritage tourism plays an important role in the national economy. Cultural and heritage tourism was seen by a majority (72%) of the public as a way of providing jobs and boosting the economy. There was considerable support for more investment. About two-thirds (67%) of the adult population thought the government and private sector should invest more in cultural and heritage attractions.

Conclusion

Sites of major historical or cultural significance have the potential to attract many young visitors, and the data presented here shows that young South Africans are interested in the nation’s history and heritage. However, the majority of the ‘born free’ generation have not visited such sites and many are not aware of their existence. Heritage tourism may contribute greatly to economic growth, but it is also important for creating a sense of national social cohesion. More must be done to help young adults visit cultural and heritage sites, and funding made able to more widely promote such sites to young people. ■

Authors: Steven Gordon, PhD intern, Democracy, Governance and Service Delivery (DGSD) programme, HSRC; Jarè Struvig and Benjamin Roberts, co-ordinators of the South African Social Attitudes Survey (SASAS), DGSD, HSRC.



www.flickr.com: President Jacob Zuma with his Chinese Counterpart President Xi Jinping ahead of the BRICS Summit. (Photo: GCIS)

The 'soft' power of China and South Africa

The focus of attention in discussions around the BRICS countries – Brazil, Russia, India, China and South Africa – has generally been to point out the differences between members of the group in terms of ideologies and values. But there are more similarities than meet the eye, writes *Narnia Bohler-Muller*.

Both China and South Africa share similarities in their foreign relations around the use of soft power through accentuating the traditional philosophies of Confucianism and ubuntu. And both countries profess to seek global reform through this soft use of power.

The emergence and unavoidable significance of BRICS

With the move towards a more multilateral and polycentric world order since the Cold War, and towards achieving more equity for developing countries and the global South, the BRICS nations are emerging as global political and economic leaders. The primary stated aim of this relatively young grouping – which has been in existence since 2009, with South Africa joining in December 2010 – is to exert pressure on the international community to reform institutions, such as the United Nations Security Council (UNSC), the World Bank (WB), the International Monetary Fund (IMF), and the World Trade Organization (WTO) to become more democratic, effective and representative.

This article aims to analyse the value-oriented (governance, human rights, economics, security, etc.), foreign policy approaches of China and South Africa within the context of soft power diplomacy. Realistically, without 'winning' nations over to agree on certain principles, both in the North and the South, BRICS is sure to fail. It is clear that much work still needs to be done to ensure that levels of trust increase.

China's Confucian path

What lies at the heart of China's soft power, and cultural diplomacy, is whether as a member of BRICS it can inspire confidence in its ability to lead global reform. It is common

cause that a state's foreign policy needs an environment built on strategic trust and shared values to be successful. There are elements of Confucianism that strengthen China's influence within BRICS and with other reformist nations.

At the heart of China's soft power is whether it can inspire confidence in its ability to lead global reform.

The notion of 'harmony' (sometimes referred to as stability) in Confucianism, a value that clearly underlies China's economic reforms and foreign policy framework, is founded on the so-called three bonds, namely those of ruler and minister, father and son, and husband and wife. In Confucian thinking, these bonds are expected to enhance harmony within Chinese society itself, but this focus on harmony can also be seen in China's foreign policy.

Thaddeus Metz, humanities professor at the University of Johannesburg, points out that the hierarchical nature of the three bonds is palpable. Essential to the idea of harmony as a Confucian value is the recognition of 'higher' and 'lower' positions, with the governed, the young and women occupying the lower ranks.

This can be described as an acceptance of inequality as a part of society, which may be a reaction to the more radical elements of Maoism. Although there have been

strains of Confucianism that interpret the hierarchy in terms of unconditional obedience on the part of 'inferiors', more recently the emphasis has been on reciprocity and harmony, often expressed as 'win-win' relationships or mutually beneficial relationships.

Chinese foreign policy reflects this emphasis on harmony in relationships and mutually beneficial relationships, which resonates with South Africa's focus on ubuntu in its foreign policy. Another value underlying Confucianism is pragmatism, which is reflected in the prioritising of poverty alleviation, infrastructure development, and stability in domestic and foreign policy. Besides hierarchy and pragmatism, Chinese thinking also has a secular tendency, as it lacks a strong religious base.

SA is probably the African country with the best claim to soft power.

South Africa's focus on common humanity

Since 1994, South Africa's moral authority and willingness to play an active role in the world gave it unique leverage with both the global North and the South. On the continent, South Africa is probably the country with the best claim to the exercise of soft power through its history, culture, political values and the legitimacy of its foreign policy.

SA's influence and moral persuasion come largely from soft power.

Pretoria's preferred instruments for advancing global priorities (Africa and multilateralism) have been consensus building, dialogue and negotiations, while avoiding resorting to force. Constructing bridges between positions that seemed irreconcilable has also proved a strong national trait. Given its middle ranking as a power, South Africa's influence and moral persuasion come largely from soft power, which would be achieved not only through public diplomacy, but by leading by example in both political and economic domains. Recent events, however, have placed South Africa in a difficult situation in terms of both internal and external diplomacy, with the failure to arrest the Sudanese leader Omar al-Bashir at the AU Summit in June 2015.

Similar to the emphasis placed on history, culture and values in China, in the Department of International Relations and Cooperation (DIRCO) white paper, *Building a Better World: the Diplomacy of Ubuntu*, South African international relations are informed by the history of colonialism and the liberation struggle, as well as by the hard-won constitutional values of dignity, equality and freedom.

DIRCO's policy states that the philosophy of ubuntu means 'humanity', and is reflected in the idea that we affirm our humanity when we affirm the humanity of others, and that this value must inform South Africa's interactions within

multilateral institutions. South African foreign policy will be framed by respect for our common humanity and the diversity of nations. It is the recognition of the interconnectedness and interdependency of humanity. This emphasis on harmony is similar to that of Chinese Confucianism.

Despite scepticism, the BRICS nations share a willingness to lead within and beyond their regions.

Despite scepticism, all the BRICS nations share a willingness to lead within and beyond their regions. While capacity for such action is available, what remains sticky is the absence of a clear bestowal of a mandate by potential 'followers'. Although the BRICS member states have profound differences in their leadership style at the regional and global levels, they do have in common a reliance on soft power to influence other global and regional players. China and South Africa have used a values-based foreign policy strategy to win support for their positions on the global stage, and this strengthens the position of BRICS as a grouping.

Confucianism and ubuntu have the potential to act as counter-balances to aggressive neo-imperialist efforts.

Conclusion

Economic reforms under the banner of 'socialism with Chinese characteristics' have made China a powerful global player and have resulted in a substantial improvement in the well-being of the Chinese people. As a result of this, China carries with it the responsibility of global leadership in the arenas of development and (sustainable) growth. It is hoped that through the responsible use of soft power it can bring to bear some benefits for all.

South Africa's political and cultural heritage also has the potential to contribute towards BRICS' growing influence. Despite being a small economy in relation to its BRIC partners, South Africa is ideally situated at the tip of Africa – often referred to as a 'gateway' to Africa – and has a moral authority that underpins its diplomatic successes. One hopes this moral authority remains intact as South Africa enters into new terrains, especially in terms of geopolitics.

The philosophies of Confucianism and ubuntu have the potential to act as counter-balances to aggressive neo-imperialist efforts and ensure an end to humanity's suffering. The question remains, is BRICS really doing things differently? ■

Author: Professor Narnia Bohler-Muller, deputy executive director, Democracy, Governance and Service Delivery programme, HSRC.

Accelerate cutting-edge research on youth and families

The HSRC has a long history of work focusing on young people, families and diversity. In this article we showcase four projects currently funded by a DST-NRF* Centre of Excellence in Human Development (CoE-HUMAN) that are playing a catalytic role in driving this agenda.

PROJECT 1: A CONSORTIUM OF GLOBAL SOUTH YOUTH SCHOLARS

Do the youth living in the Global South cope differently with adversity than their counterparts in the Global North? Sharlene Swartz, in an attempt to uncover some answers, is working with a Consortium of Global South Youth Scholars.

The study investigates whether youth living in the Global South in adverse environments deal in different ways to their Global North counterparts with issues such as poverty, educational quality, unemployment, food security and violence. Do their

paths to independent living differ in matters of citizenship, mobility, disability, sexual and reproductive health, digital divides, social solidarity, school to work transitions, and home? We are trying to establish to what extent the magnitude, impact and engagement with these challenges varies between youth in the Global North and those in the Global South.

In my experience as a Global South scholar who spent a considerable amount of time in the Global North, scholars in the Global South have for too long relied on Global North representations, theories, policies and methodologies that do not address the pressing concerns of young people growing up in the Global South.



Youth in Langa.

These include US-driven positive youth development that focuses on dynamic systems, risks and protective factors; UK-led sociocultural approaches centring on youth agency, sub-cultures, resistance and cultural reproduction; politically-driven programmes of youth policy development, citizenship studies and human rights approaches; and religious programmes targeted at youth by Christian and Islamic youth workers.

Scholars in the Global South have for too long relied on Global North representations.

To study these observations, we will be working with a Consortium of Global South Youth Scholars.

Areas of focus include determining empirical differences between youth in the Global North and South; commissioning new studies to obtain a better and fuller picture of the challenges these youth – and those who engage with them – face; and ultimately developing new theories to accelerate and establish southern scholarship on youth.

As part of this grant from the CoE-HUMAN, a brief survey of South African youth agencies is planned that will ask respondents to identify challenges faced by the youth with which they work, and to differentiate these challenges by the youths' level of adversity.

The consortium will involve a series of roundtable discussions with invited academics around the world – added on to existing conferences and study visits where possible. Two of these have already taken place: one at the University of Cambridge in March 2015 and another at the City University of New York in June 2015.

Two further events are planned, a panel discussion session at the World Social Sciences Forum, which takes place in Durban, South Africa, from 13 to 16 September 2015, and a second discussion session at the Association for Moral Education's annual conference, taking place in Sao Paulo, Brazil, in November 2015.

The consortium will be used as a basis for a future, long-term and large-scale programme of research, for which further funding will be sought from the CoE-HUMAN and from the Jacobs Foundation, Switzerland.

Journal articles currently in progress include 'Approaches to the study of youth: A southern perspective'; 'What does it mean to be in the Global South?'; 'Navigational capacities: A conceptual metaphor for youth development in adversity and representations of youth in global and social media'.

Author: Professor Sharleen Swartz, acting director, Human and Social Development (HSD) programme, HSRC. This project is funded by an Accelerator Award from the CoE-HUMAN. Two post-doctoral fellows, both recipients of CoE bursaries, are also working on the project: Dr Adam Cooper, City University of New York, (scheduled to return to South Africa soon), and Dr Alude Mahali, HSRC.

**Department of Science and Technology-National Research Foundation*

PROJECT 2: POLYAMORY – MORE THAN JUST MULTIPLE PARTNERS

In this project, Stanley Molefi addresses a potentially novel way of enhancing HIV prevention programmes in South Africa by investigating polyamory – a concurrent partnership in which it is possible and valid to have 'openly' sexual and/or romantic partnerships with multiple people.

Background research indicates that scholars from different fields, including psychology, sociology and anthropology, have identified the co-existence of monogamy and non-monogamous relationships in many societies. In fact, 'alternative' sexual practices are more commonplace than is generally believed.

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Even though the visibility of some of these (e.g. same-sex practices) have increased in recent years, for the most part, 'other' sexualities continue to be practiced under a veil of secrecy, hidden from society where they are frequently stigmatised and demonised.



These patterns of 'other' sexualities, including non-monogamy, are observed in the Global South, including in Africa. However, in South Africa and the broader region of southern Africa, non-monogamous, concurrent sexual partnerships are linked to risks for HIV/AIDS as well as other sexually transmitted infections. For this reason, the prevention policy framework and scholarly mindset that advocates for the reduction of all forms of concurrent sexual partnerships as a potential behavioural HIV prevention strategy, is well-established in the region, even though it poses empirical challenges.

The idea that some forms of concurrency and other forms of multiple partnering are driving HIV infection is disputed by some scholars in the field of HIV/AIDS. Thus, dissenting scholars (e.g. Allais & Venter, 2012; Lurie & Rosenthal, 2010) raise the question of whether all forms of concurrent relationships pose the same risk to HIV infection.

Some research points to a lack of substantial evidence, inconsistent definition, and difficulty in measuring concurrent partnerships as indicating that not all forms of concurrency is related to HIV-infection risk. Indeed, it is necessary to distinguish between concurrency that carries the risk of HIV and others that do not pose the same risk. My investigation centres on the contention that the practice of polyamory (a relationship where someone has sexual and/or romantic partnerships with multiple people simultaneously) is a form of responsible concurrency that might have the potential to lower the risk of HIV infection.

The study involves individuals in polyamorist relationships who reside in Gauteng, and utilises in-depth individual interviews. I use the social cognitive theory as a framework to explain the structuring of concurrency in South Africa. The theory is useful in fleshing out how a cognitive tool like language is employed in the ordering of concurrent partnerships, as well as how government policies in South Africa, such as the OneLove campaign, shape the practice of concurrency.

In analysing the information I hope to learn how relationship issues such as contraception and/safer sex practices are discussed and negotiated in this open 'doing' or 'practice' of multiple partners. Extrapolating such

idiosyncratic knowledge within this form of concurrency may enhance the current formulation of HIV prevention programmes in South Africa.

This work was presented at the 2015 Academic Organization for Advancement of Strategic and International Studies International Multidisciplinary Conference in Paris. The paper is under consideration for a peer-reviewed publication.

Author: Stanley Molefi, HSRC trainee and CoE-HUMAN doctoral candidate.

PROJECT 3: CHILDREN IN FAMILIES

Twenty years since political emancipation, children in South Africa have experienced transformation at many levels. But transformation has different forms and not all are positive. Monde Makiwane and Ernest Khalema share information about a book project on whether South African families are in crises, or whether they have adjusted to change and found novel ways to perform in the new dispensation.

In 2014 there were almost 19 million children in a population of 53 million. There is wide diversity among these children. Some struggle with lack of shelter, food, clothing, proper education, support, neglect, poverty, crime and abuse. Their lives are in a constant state of uncertainty, with little time for fun and enjoyment. For others, childhood is carefree; they lead fulfilled lives and experience positive growth.





The book focuses on the everyday socialisation of children in South Africa, particularly black children. We are looking at a knowledge gap in the understanding of children's lives and their positions within families in South Africa to better understand the processes in both families and society that promote child competence and resilience.

Why the emphasis of children's positions within families? The family represents a key social unit into which children are born. The composition of South African families is a kaleidoscope of nuclear, extended and reconstituted families.

The majority of families are multi-generational and extended.

A historical overview of families reveals significant changes in traditional families over the years, brought about by colonisation, apartheid, modernisation and globalisation. Unlike earlier predictions, nuclear families with two adults (recently legally extended beyond heterosexual partnerships) who maintain a legally recognised partnership, with or without children who are either their biological or adopted children, form only a small section of society. The majority of families are multi-generational and extended, with children being reared by a single rather than both parents.

The chapters in the book recognise and affirm these complexities and diversity of South African family systems. In most South African cultures, as is on other parts of the continent, the family is extended to aunts, uncles, grandparents, cousins and other relatives. In these complex family forms, obligations to wider kin might not be static, complicating family structure even more. These families might be distributed over large geographical spaces, resulting in large numbers of children who live with one or both biological parents for varying lengths of time, if at all.

This book also examines whether the South African family is in crisis, whether it is unable to perform its obligations to children, or whether it has adjusted to change and found novel ways to perform its duties.

While the chapters adhere to academically rigorous research, we aim for accessible language to foster a wide readership. The target audience for the book is post-graduate students and researchers in social sciences, humanities and health; NGOs; and government officials working with policies and interventions for children and families. The book will demonstrate insider knowledge of the African family, including positive African traditional practices. The editors are on track for publication in early 2016.

Authors: Drs Monde Makiwane and Ernest Khalema, Economic Performance and Development programme, HSRC. Co-authors: Professor Mzikazi Nduna and Munyane Mophosho, University of the Witwatersrand. The project is funded by the CoE-HUMAN to produce a book, Lives and Times: Children in South African families, to be published by Cambridge Scholar Publishers.

PROJECT 4: NON-CONVENTIONAL FAMILIES

There is a gap in scholarship on sexuality in relation to families and parenthood in the many different family forms in South Africa. Tracy Morison, Ingrid Lynch and Vasu Reddy aim to close this gap with a book project entitled *Queer Kinship: Perspectives on sexuality, families and reproduction in South Africa*.

While the nuclear family is represented by media and popular culture as the 'norm', significant legislative reforms of the recent past in South Africa, as well as advances in reproductive technologies, have created the possibility for even greater family diversity, including family formation among lesbian, gay, bisexual, transgender and intersex (LGBTI) persons and other sexual minorities.

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Family diversity is explicitly recognised by South African policy.

Family diversity is explicitly recognised by South African policy. The White Paper on Families stresses the need not only to acknowledge, but also to 'respect the diverse family types and values in the country'. The National Development Plan explicitly calls for the eradication of discrimination in relation to family composition and sexual and gender identities. Nevertheless, families parented by people from sexual minority groups continue to occupy a socially marginal position despite the strides made towards legal recognition of and protection of queer families.

To combat this discrimination and to address the diverse needs of queer families, we need to understand how the particular South African sociocultural space shapes the reproductive intentions, decisions and transitions to parenthood, and the experiences of family among people in these groups. At present, there is a strong heterosexual bias in sexual and reproductive health services; psycho-social support services, including counselling and screening in fostering and adoption services; social security practices; schooling practices and so on.

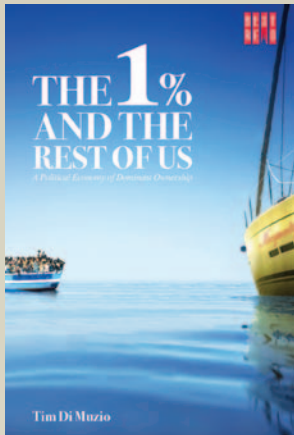
The book *Queer Kinship* focuses on generating knowledge on this topic, as well as stimulating research networks around this budding area of scholarship on South Africa. It addresses three main themes:

- Forming families, a theme that deals with reproductive choices, desires and intentions;
- Seeing and being families, a theme focused on representations and constructions of queer families; and
- Doing family, a theme addressing people's experiences within queer families.

Notable contributors include Professor Carien Lubbe de Beer, who produced the South African landmark text on the subject with John Marnell, Home Affairs, published in 2013; Liesl Theron and Ronald Addinall, who have worked extensively around transgender persons and reproductive health; and Professor Desiree Lewis, who has written extensively on the topics of gender and sexuality.

Among these outstanding scholars are also some emerging voices, for instance Katlego Disemelo, whose chapter reports on his master's research around representations of queer families, and Jessica Scott, whose contribution considers lesbian women's family formation and the law. Also notable are two photo essays, one by artist and activist Germain de Larche and the other by Dr Zethu Matebeni and Nikki Carter. To encourage collaboration and innovation, the editors are hosting an author workshop on the topic of queer families that builds on and expands existing scholarship. The book is expected to be published in late 2016. ■

Authors: Drs Tracy Morison and Ingrid Lynch, Human and Social Development (HSD) programme, HSRC, and Professor Vasu Reddy, HSRC/University of Pretoria. The authors received a CoE-HUMAN Opportunities Grant for the book, Queer Kinship: Perspectives on sexuality, families and reproduction in South Africa.



THE 1% AND THE REST OF US: A POLITICAL ECONOMY OF DOMINANT OWNERSHIP

Author:	Tim Di Muzio
Publication month & year:	July 2015
ISBN (soft cover):	978-1-928246-04-6
Format:	Demy (216 mm x 138 mm)
Extent:	256
Price:	R260
Rights:	Southern African Rights

About the book

The Occupy movement managed to draw global attention to the massive disparity of income, wealth and privilege held by 1% of the population in nations across the world. In *The 1% and the Rest of Us*, Tim Di Muzio explores what it means to be part of a socio-economic order presided over by the super-rich and their political servants.

Incorporating provocative and original arguments about philanthropy, social wealth and the political role of the super-rich Di Muzio reveals how the 1% are creating a world unto themselves in which the accumulation of ever more money is really a symbolic drive to control society and the natural environment.

A timely and innovative book that provides readers with the first global political economy of the 1%, while demonstrating how resistance can continue to challenge their rule.

Endorsements

'Tim Di Muzio debunks the radically antisocial belief that wealth is the sole result of individual efforts and talents. His contribution is novel and original, but it is also a significant part of a growing clamour for change.'

Danny Dorling, author of *Inequality and the 1% and Population 10 Billion*.

'Capital is power, wealth is social, the rich are undeserving, growth is unsustainable. In this timely book Di Muzio takes aim not only at the emergence of a global super rich, but also at the ideologies of wealth generation that keep them in their place and us in ours – an indignant call to put people and planet above profit and status.'

Amin Samman, City University London.

'This compelling and original work is a must read: it brilliantly illuminates a world dominated by a tiny, immensely powerful ruling class who have accumulated enormous wealth, even during the global economic crisis. It explains why and how that has happened, who they are, and not least how such plutocratic power can be resisted and transformed to better serve the majority of people on the planet.'

Stephen Gill, York University, Toronto.



PUTIN AND THE OLIGARCH: THE KHODORKOVSKY-YUKOS AFFAIR

Author:	Richard Sakwa
Publication month & year:	August 2015
ISBN (soft cover):	978-1-928246-03-9
Format:	240 mm x 168 mm
Extent:	336
Price:	R270
Rights:	Southern African Rights

About the book

The arrest of Mikhail Khodorkovsky, the head of the Yukos oil company, in October 2003, was a key turning point in modern Russian history. From being one of the world's richest and most powerful men, Khodorkovsky became Putin's prisoner. After two controversial trials, attracting widespread international condemnation (revealing accounts of which feature in the book) Khodorkovsky was sentenced to fourteen years in jail. In this book, Richard Sakwa examines the rise and fall of Yukos and considers the relationship between Putin's state and big business during Russia's traumatic shift from the Soviet planned economy to capitalism, as well as Russia's emergence as an energy superpower. The attack on Khodorkovsky had – and continues to have – far-reaching political and economic consequences but it also raises fundamental questions about the quality of freedom in Putin's Russia as well as in the world at large. In addition the author delves into the writings of Mr. Khodorkovsky in prison which show him to be a thoughtful critic of Russian reality.

Endorsements

'Only Richard Sakwa, with his unrivalled detailed knowledge of contemporary Russia, would be able to respond so quickly to Khodorkovsky's unexpected early release from prison with such a comprehensive account of his life to date, combined with a penetrating analysis of the significance of this crucial personality.'

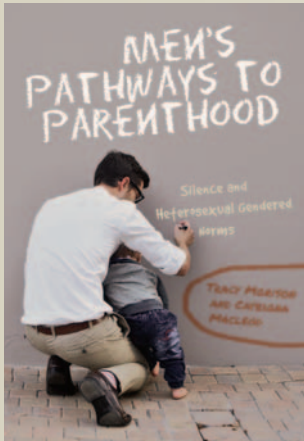
Bill Bowring, author of *Law, Rights and Ideology in Russia: Landmarks in the Destiny of a Great Power*.

'Richard Sakwa has provided a lively, balanced, and insightful account of the rise, fall, and regeneration of one of Russia's richest men and his confrontation with the country's leader.'

Peter H. Solomon, Jr., University of Toronto.

'... the best account yet of Khodorkovsky's rise, fall and metamorphosis ...'

Mark Galeotti, Professor of Global Affairs, New York University.



MEN'S PATHWAYS TO PARENTHOOD: SILENCE AND HETEROSEXUAL GENDERED NORMS

Authors: Tracy Morison and Catriona Macleod
Publication month & year: July 2015
ISBN (soft cover): 978-0-7969-2503-9
Format: 240 mm x 168 mm
Extent: 208
Price: R190
Rights: World Rights

About the book

How does the decision to become a parent unfold for heterosexual men? Is becoming a father a 'decision' at all or a series of events? These questions are the starting point for this critical book, in which the authors unravel the social and interpersonal processes – shaped by deeply entrenched socio-cultural norms – that come to bear on parenthood decision-making in the South African context.

Drawing on the narratives of white, Afrikaans women and men, *Men's Pathways to Parenthood* uses an innovative discursive method to illuminate the roles masculinity, whiteness, class, and heteronormativity play in these accounts. *Men's Pathways to Parenthood* addresses an under-researched topic in gender studies – namely, men and reproductive decision making – and will be an important resource for scholars in gender studies, sexualities, and reproductive health, as well as those interested in innovative approaches to discursive research.

Endorsements

'This book provides a sophisticated analysis in the under-researched area of the part men play in reproductive "decisions". It offers valuable insights through the innovative synthesising of the theorisation of gender performativity with a narrative-discursive methodological approach. This synthesis leads to a persuasive, rich and nuanced account of the data that enables links to be made between macro and micro contexts, and offers a substantial consideration of power, as well as the potential for change. What is particularly telling is the analysis of "noise" used to conceal the "veiled silences" that surrounded an inability to construct stories of choice in male reproductive decisions. This book makes an excellent contribution to the literature in gender studies, sexualities, reproduction and critical psychology.'

Sally Johnson, Senior Lecturer, Division of Psychology, University of Bradford.

'This book deals with the neglected topic of men's roles in decisions about having children. It contributes significantly to building a knowledge base around the intricacies and complexities (including the silences) associated with male parenthood and decision making in the South African context and beyond. The work showcases innovative critical methodology, developing performativity theory, discursive psychology, and narrative methods. The authors provide a nuanced and compelling analysis that highlights the roles of changing gender norms, whiteness, and heteronormativity in shaping their research participants' accounts. The book presents valuable findings that will be relevant to researchers and practitioners studying families and reproduction outside of hetero-patriarchal norms.'

Carien Lubbe-De Beer, Chair, Gender and Sexuality Division, Psychological Society of South Africa.



POPULAR POLITICS IN SA CITIES: UNPACKING COMMUNITY PARTICIPATION

Volume Editor: Claire Benit-Gbaffou
Publication month & year: July 2015
ISBN (soft cover): 978-0-7969-2464-3
Format: 240 mm x 168 mm
Extent: 304
Price: R270
Rights: World Rights

About the book

Community meetings seldom lead to significant change in urban policies, and have been accused of being sterile, sedative, or manipulative. This book starts from a simple question: why do people then continue to participate in these meetings, sometimes massively, and on a regular basis? Authors from a variety of disciplines explore the multiple roles of these 'invited' spaces of participation. From consolidation of individual social status and networks, to the construction and framing of the local 'community', the display of political or group loyalties and maintenance

of clientelist exchange, access to information, rumors or gossip but also forms of education on who and what is the state, invited spaces of participation are also, crucially, places of emergence of collective awareness, through shared expressions of frustration, that can lead to political mobilisation and other, less institutionalised forms of participation. This book, unpacking community politics and rethinking the complex articulations between 'invited' and 'invented' spaces of participation, is of relevance for international and national audiences interested in urban governance and local democracy.