Review Article
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Debunking the myths of the South African welfare system

Abstract

The post-Apartheid South Africa brought about changes in quite a number of areas of South African citizens' lives. One area with discernible changes is in the domain of citizens' welfare or wellbeing, prompting discussions and debates about whether South Africa is a welfare state or not; or if indeed South Africa is a welfare state, what kind of welfare state is it. Such questions are pertinent in making judgements about the quality of services that citizens receive from the state. But it is important to understand that social services are not delivered in a (political) vacuum. The ideology which is a system of ideas for political or social action,1 model and mode of delivery eventually impact service delivery which eventually has a direct bearing on the citizen's quality of life. Attempts to understand the South African welfare system are conflated by the political rhetoric and clichés such as housing for all, health care for all and education for all, amongst others. These slogans sound like music to the ears of the voting masses, and could have also fuelled the #Fees must fall and Free higher education for all movement. In this paper, Wilensky and Lebeaux's model will be used to analyse the South African welfare system and assess whether the demands and claims for a socialist welfare model is realistic and attainable.

Keywords: debunk, myths, welfare system, residual and institutional

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Introduction

South African citizens experienced and lived through majority rule in the past twenty years. A score of years is a significant period in any democracy, and it is never a futile exercise to sit down and reflect on the period gone by. One way of taking stock of the progress made thus far is by assessing the milestones achieved in order to determine whether we are on course. This is one of the goals that this paper hopes to achieve. But before one gets to doing that, it is imdperative that we define key concepts so that we move in tandem.

Background

The South African transition from Apartheid to democratic majority rule ushered in some notable positive changes in the lives of South African citizens, especially the historically disadvantaged and marginalized Africans. Africans benefited tremendously from this transition, and there is a lot of empirical evidence to confirm this. One area, which is the focus of this paper, is the whole notion of welfare/wellbeing. The two concepts will be used interchangeably throughout the paper, because essentially they denote one thing. Hoggett[2] defines wellbeing as the "totality of an individual's social relations. Well-being or welfare factors most commonly used to measure the Quality of Life (QoL) are related, among others to social services, housing, transport, environment, health, education, culture and public safety.[3] These factors are constituent elements of welfare or wellbeing, and they are provided or not provided by a welfare state bent on a particular ideology, delivered on a particular model and in a particular mode of delivery, that is through national government department or provincial government or local government. The mode or form of public service delivery is critical in that it may affect operating conditions and perhaps the quality of life of citizens.[4]

Definition of key concepts

The following concepts are critical to our understanding of the argument that follows:

Debunk

Debunk means to expose the falseness of an idea or belief.[5] The word debunk is actually the antonym of bunk, which means pretentious nonsense; claptrap; a long winded oration meant for hometown consumption.[1] It is therefore the sole purpose to declare as a fallacy the notion that South Africa is the biggest welfare state in the world. In doing this, the authors will reject this fallacy and those smaller once that undergird it.

Myth

A myth is a frozen point of view. President John F Kennedy had the following to say at Yale University on June 11, 1962, "Mythology distracts us everywhere - in government as in business, in politics as in economics in foreign affairs as in domestic policy".[1]

South Africa

A definition of South Africa is provided by section 1 of the constitution. It states, South African republic is one sovereign democratic state founded on the following values:

a) Human dignity, the achievement of equality and the advancement of human rights and freedoms

b) Non racialism and non-sexism

c) Supremacy of the constitution and the rule of law

d) Universal adult suffrage, a national common voters roll, regular elections and a multi party system of democratic government to ensure accountability, responsiveness and openness (Section 1 of Act 108 of 1996).

Welfare state

The phrase of the welfare state is sometimes used to describe any state that concerns itself in any manner with problems beyond the mundane maintenance of law and order.[6] Welfare state is the institutional arrangements through which the state provides money, goods, and services to its citizens. This concept is used to refer to main societal institutions such as social security system, state funded education system, the state role in the funding of housing, and state personal and social work services.[7] A most comprehensive definition of a welfare state is by Susser[8] "a state committed to providing its people with a wide range of social services – health care, unemployment insurance, social security, old age benefits". Needless to say South Africa meets these criteria, and therefore qualifies to be referred to as a welfare state. The vexing question, though is what kind of welfare state? Is it big or small? What is the extent of coverage? All or some of these questions will be answered through Wilensky and Leabeaux's model.

Welfare system

Whereas the welfare state is the provision of services and goods to the citizens, the welfare system is made up of those instruments, institutions and organizations used in the delivery of these services. Such constituent parts are families, schools, law enforcement agencies, health care services etc. Hence, the welfare system on the other hand includes organizations and mechanisms primarily concerned with providing or guaranteeing the social welfare of citizens. These may include non-state organizations such as those in the voluntary sector and those in the private (for profit) sector.[7]

Problem statement

Social welfare is an issue of prime concern in economic[9] and political sciences[8] and that is why much is said about South Africa being a biggest welfare state in the world.[10] The reason for such a statement could be that the South African welfare services are largely funded by the taxpayer through the fiscus; and a lot has been said about the sustainability or lack thereof of the welfare services, in particular social grants. Dissatisfaction with the allocation of social grants to the poor is seen as living thrift off the welfare state. What seems to fuel the negative attitude towards these social grants is that the taxpaying public is smaller as compared to the beneficiaries. That is why serious concerns were raised about the sustainability of the system going forward. In criticising the system, some commentators went overboard by suggesting that South Africa is the biggest welfare state in the world. The authors of this paper contend that the statement that South Africa is the biggest welfare state is problematic and begs the question, Is South Africa a welfare state? If it is a welfare state, what kind of welfare state is it? Which ideology drives this welfare state, and how are services delivered (model) and is the mode of delivery (national, provincial or local government) the most efficient and ideal one? These questions and problems spurred this paper.

Theoretical framework

The study and analysis of the welfare state may be approached from various and divergent vantage points. Social policy scholars[8,11] studied state welfare by inter alia analysing ideologies that influence governments. A closer scrutiny of these writings yields identifiable ideologies that focus on inter alia:

a) Anti-collectivism, citizenship, intergrationism[12]

b) Residualism, industrialism and institutionalism[13]

c) Individualism, reformism, structuralism, Marxism[14]

d) New right, middle, democratic, Marxism, feminism, Greenism, socialism[15]

e) Residual and institutional approach

Inevitably, the concept of the welfare system commands a lot of attention in social policy because it addresses itself to how citizens are governed. Since there are a myriad of analytical tools from which to study the welfare system, this paper will be guided by the seminal work developed by American social policy analysts, Wilensky and Lebeaux in 1965. In their analysis, the welfare system is either residual or institutional. Comparatively, this may be one of the least complex ways of looking at the welfare state of a country such as South Africa, referred to as a third world or a developing country in other literature.

Wilensky and Lebeaux posit that any welfare system anywhere would demonstrate either residualism or institutionalism. The residualist welfare system calls for organized public intervention only when the normal resources of family and market break down.[16] In this type of welfare system, welfare services are provided ex post facto. In other words, one first experiences and expresses a need before a service or help can be administered. This approach is associated with minimal state intervention in the provision and financing of social welfare services and social security. This proposition presumes that social welfare provision should be of a short term, emergency nature and should tide people over a crisis period. Provision should cease once the crisis is over.[11] One may be justified to label this kind of system a reactive welfare system more especially those services become available in an emergency, and the focus is on individual behaviours and responsibility.[16]

On the flip side of the residualist welfare system is the institutional approach. In this context, social welfare programmes and services are part of the social structure and exist as part of the normal functioning of society. In other words, social services and programmes are the raison d'être of a government, the very reason why governments are there. Welfare services and programmes are not just but by the way kind of services, but they are the quint-essential elements of a fully functioning government. Institutionalists are of the view that government agencies are the best deliverers of social policies and that access to social provision and social rights should be institutionalised through legislation, fiscal measures, statutory regulations and comprehensive services.[11] The principle of universality, which is a criterion that distinguishes institutionalism from residualism; refers to all citizens of a country to universal coverage and access to services and benefits such as income security, medical care, education and housing on an ongoing basis.[11] Now, having considered these two options, the question is where does South Africa fit. Which model is similar to the South African welfare system? This paper wishes to submit that South Africa is more residual than institutional, public opinion and political slogans notwithstanding. The appropriate cliché is that South Africa talks left and acts right. Much of this to follow in the following paragraphs, guided by the following objectives:

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This paper pursues the following objectives:

a) Confirm that South Africa is indeed a welfare state

b) Demystify conceptions around the South African welfare state

c) Argue for welfare as a competency of local rather than national government

Methods

This paper is largely conceptual in nature, and therefore relies extensively on available literature and models.

Findings

Political rhetoric carried through mass media is often celebrated and has praise heaped upon it as a boon for humanity. No doubt, media plays a very important role in society. It serves to inform the public; and living in a country that cherishes and upholds media freedom advances the goals of citizenship for all. However, just like all things in life, political rhetoric carried through media also has its down side. For instance, notwithstanding the fact that media is a very influential tool, its intentions, indirectly and by design may lead to unintended consequences. As a matter of fact, the problem addressed in this paper, emanates largely from newspaper reports and electronic media. This paper is therefore a feeble response to some of the claims carried innocently or knowingly by the media. The aim of this paper is therefore to correct some of those inaccuracies. In this regard, the paper will report findings or rather myths reported in the newspapers and provide scientific evidence to debunk some.

Myth 1: South Africa is the biggest welfare state in the world

This myth is based on the number of social grants recipients as vis-à-vis the taxpayers which yield the unacceptably high dependency ratio. The outcry has a resounding chorus: "Look at South Africa's dependency ratio-it's three people to one taxpayer and it's unsustainable," Mike Schussler in The Mail and Guardian (18 Feb 2010). Whereas it may be true that dependency ratio is unsustainable, South Africa is certainly not the biggest welfare state in the world. Firstly, South Africa is not the biggest welfare state in that it is residualist and this means minimal state intervention in the daily lives of people, and not all citizens have access to services. In keeping with the principle of residualism, only those who qualify in terms of the means test get services. The welfare state benefits only those who prove that they are unable to meet their own welfare needs.

The biggest welfare state in the world would be found amongst the Organisation for Economic Co-operation and Development (OECD) countries, not in a developing country such as South Africa whose GDP is just a fraction of the United States economy. By the way there is also evidence that South Africa is the smallest member of Brazil, Russia, India, China and South Africa (BRICS) (The Economist 2013), and if that is the case how on earth would South Africa's welfare state be the biggest in the world. The statement is both alarmist and false.

Reiterating Mike Schussler is Doneva[17] had the following comment to make about social grant expenditure being estimated at R89bn in the current fiscal year, a figure large enough to prompt some commentators to call South Africa the "biggest welfare state" in the world. The 2010/11 allowance for social grants represents a 12% increase year-on-year.

Reality

At a more simplistic and basic level, a welfare state "involves state responsibility for securing some basic modicum of welfare for its citizens".[18] To achieve this rudimentary goal, a welfare state represents arrangements through which the state provides money, goods, and services to its citizens.[7] Indeed South Africa has features of a welfare state in that it is able to somewhat meet the most basic welfare needs of her citizens. The size of expenditure on social assistance is undeniably huge. Be that as it may, the difference between South Africa and other welfare states is that the bulk of South African expenditure on welfare is on social assistance whereas the advanced welfare expend resources on social insurance. Simply put, citizens of most advanced welfare states create their own welfare by paying premiums which can be cashed later on in life on rainy days, and this is not necessarily the state's responsibility.

Social insurance is a form of insurance whose features are captured by Strydom[19]

It must be a contract whereby for some consideration, usually but not necessarily for periodical payments called premiums, you secure to yourself some benefit, usually but not necessarily the payment of a sum of money, upon the happening of some event…the event should be one which involves some uncertainty. There must be either uncertainty whether the event will ever happen or not, or if the event is one which must happen at some time, there must be uncertainty as to the time at which it will happen…Within the South African context, the largest beneficiaries of grants do not have an income except for some irregular cash transfers from friends and family and therefore depend almost exclusively on government transfers thus prompting the uproar of the biggest welfare state in the world. The size of the country's economy determines the size of the welfare state. South Africa's economy is no way near the size of all the OECD countries and it is therefore preposterous to imagine that South Africa would have the biggest welfare state.

Myth 2: South Africa is a socialist state

Socialism is an "economic system based on equality, government ownership and direction of heavy industry, and only limited private property" (Susser, 1995:282). The South African constitution protects private property rights and eschews state ownership of the large portion of the means of production. That is why it is a myth and a fallacy to believe that South Africa is a socialist state. The reality is that South Africa is a capitalist state whose "economic system is based on private ownership of the means of production and free trade[8] founded on neoliberalism.[20–22] Sewpaul & Hölscher[23] lamented the meagre financial resources expended on welfare services as undermining transformation and defeating progress towards social development in using business terminology such as accountability, efficiency, monitoring and reporting mechanisms of government funded programmes that resonate with managerial and market discourses that emerged in the First World. The rhetoric from some politicians, widely propagated in the mass media is that South Africa is a socialist welfare state. In this context, confusion abounds when one is bombarded endlessly with the following slogans from the ruling party: "A better life for all", "Free education", "Free health care".

The reality is that South Africa is a capitalist society with a residual welfare system. One of the defining features of a residual system is selectivity, which means that services are restricted to those

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who can demonstrate need through established eligibility criteria.[16] the opposite of selectivity is universality. The principle of universality calls for social services that provide benefits to all members of society, regardless of their income or means. One of the hallmarks of a generous welfare state, found missing in the South African case is decommodification, which is the degree to which individuals, or families can uphold a socially acceptable standard of living independently of market participation.[24] In other words, welfare states differ in the ways to which they allow benefit recipients to withstand the pressure of returning to the labour market.[25] Contrary to high levels of decommodification, South Africa sits at an unacceptably high unemployment rate[21,22,26] alongside Gautemala and Brazil, the world's highest income disparities - the neo-liberal policies adopted during the 1990s pushed even essential services such as water and electricity beyond most households' ability to pay.[27] In South Africa, for one to access free education, one has to prove that one is indeed unable to provide for oneself. And this proof is done through a very intrusive, policing and stigmatising means test. Orphaned students have to submit affidavits stating that indeed their parents have died, thus bringing them secondary trauma.

Myth 3: South Africa ensures a better life for all

Due to its residual character, the South African welfare state provides minimum assistance to only those that deserve to be cushioned by the safety net in the case of a proven and means-tested need. A better life for all would be an appropriate slogan for an institutional welfare state that discourages social stratification and by extension inequality and stigmatisation of the beneficiaries of services. It is indeed a myth that South Africa ensures a better life for all. The reality is that a better life is enjoyed by the middle class and the bourgeoisie. How does one talk about a better life for all in the midst of such backlogs in housing, massive unemployment and highest forms of inequality?

Myth 4: People are entitled to grants/services

Contrary to popular belief and opinion, access to grants and services is limited to only those who demonstrate and prove need, typical to a selective approach to welfare. Eligibility to grants and services is based on a means test which promotes social control such as ensuring that births are registered, applicants have an identity document and that they are deserving South African citizens and sometimes can be used a voting fodder. The Table 1 above actually shows that the means test has been tightening from 2015, and that it would be very difficult for people to qualify for grants in years to come.

Myth 6: Availability of free education

The #Fees must fall movement is concrete evidence of the absence of free education in this country. "Free education" is only available to those who can prove need. Even those, do not necessarily get free education. Instead, they are hooked with funding organisations such as NSFAS which does not provide free bursaries, but instead loans with huge interests that students have to pay after completion of their studies. Evidence of former students struggling to pay back these loans is abound, some Vietnamese students even faking death to escape the debt trap.[28] In the largest welfare states such as Sweden for example, education is free for all. Even people changing careers late in life may go back to university in pursuit of new interests without paying a dime. A small country such as Cuba, with a GNP less than South Africa affords free education for all. How this is done, could be a question of prioritising education above purchase of arms (Arms Deal) and staging the 2010 FIFA World Cup.[20]

Table 1 Asset and income threshold (from SASSA)

Asset threshold	01-Apr-15	01-Oct-15	01-Apr-16
(Grants for older persons, disabled and war veterans only)			
Single person	R 930 600	R 937 200	R 990 000
Married person	R 1 861 200	R 1 874 400	R 1 980 000
Income threshold: (Annual amounts)			
Single person	R 64 680	R 65 160	R 69 000
Married person	R129 360	R130 320	R138 000
Child Support Grants:			
Single person	R 39 600	R 39 600	R 42 000
Married person	R 79 200	R 79 200	R 84 000
Care Dependency Grants:			
Single person	R169 200	R 170 400	R 180 000
Married person	R 338 400	R 340 800	R 360 000

Myth 7: There is free health care

Access to health care is certainly not free. Yet again, access to health care is free for the deserving needy citizens who need to demonstrate their eligibility. The South African public health care system is also burdened with shortages of supplies. Citizens keep on complaining about lack of medical supplies, particularly in primary health care settings. So the absent service cannot be said to be free when citizens obtain nothing on request. The strong intention by Minister Aaron Motswaledi to push for the National Health Insurance is acknowledgement of serious deficits and coverage of the divided health care system in this country.

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Myth 8: Child support Grant breeds laziness and dependency on the government

Research by the Southern Africa Labour and Development Research Unit (SALDRU) in the School of Economics at the University of Cape Town shows that "there is little empirical evidence" to support claims that people stop looking for jobs when they receive a grant. The CSDA report also supports research that "grant recipients do not wish to be 'dependent' on cash transfers and continue to place a high value on paid employment" and that they are "extremely motivated to get work and want to exit the welfare system as soon as they can".[22]

Myth 9: The child grant increases teenage pregnancy

A previous piece by Africa Check has shown the claim to be untrue as very few teenage mothers actually access the grant. It is actually an insult to the dignity of poor women to believe that they can risk the lives of their unborn children for a meagre child support grant.[29]

Myth 10: Parents claim grants for children who don't live with them

The Centre for Social Development (CSDA) in Africa report shows that the overwhelming majority of beneficiary children lived with the caregiver in the household.[30]

Myth 11: "Recipients misuse grant money"

Although some people do misuse their grant, for example by abusing alcohol, the CSDA report shows that "[grant] monies are mainly used for food and some basic non-food items such as school fees and uniforms, health and transport".

Myth 12: National and provincial government are best suited to administer welfare services

There is probably a relationship between the modes of public services delivery and the quality of life of the population.[3] Even though the authors may not be aware of research in this particularly in this area; they are not averse to the notion of local government as the locus and mode of delivery of welfare services. Currently welfare services are administered by the National and provincial governments. These structures and layers of government may not always be accessible to people on the ground. Poor people often have to spend money that they do not have to access Home Affairs offices to apply for birth certificates and identity documents (social control and policing) which are minimum requirements for eligibility to grants. The system is thus costly, cumbersome and stigmatising.[31]Advanced welfare states such as Sweden have located this function within municipalities, a situation that South African may have to revert to because it was part of the Apartheid setup in urban areas.

Conclusion

Confusion abound the nature and character of the South African welfare system, with a predominant and hegemonic opinion suggesting that South Africa is the most biggest welfare state, yet the reality is that the South African welfare state is smaller than the Scandinavian countries and that it is characterized more by social assistance than social insurance. The argument that South Africa is the biggest welfare state is not factual, for welfare provision is minimal and short-lived.

Recommendations

In light of the discussion thus far, the authors wish to make the following recommendations:

a) That South Africa's welfare system makes a transition from a residual to an institutional model

b) That South Africa investigates the possibility of locating welfare services at local government than instead of provincial or national government.

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Conflict of interest

The author declares that there is no conflict of interest.

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