

# The political economy of gender inequality in South Africa

WHY UNPAID CARE WORK SHOULD BE RECOGNISED IN ECONOMIC POLICY

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## Introduction

Gender inequality is the outcome of historical conditions which have produced and reproduced unequal social relations between men and women. It is these social relations which must be understood within their historical context. Thus, in order to adequately study gender inequality today we need to foreground an analysis of capitalist social relations. A comprehensive understanding of the nature of gender inequality necessitates an examination of the conditions of possibility that capitalism itself creates. This is what Marx provides us with in *Capital* (Marx, 1999 [1887]). From the outset, it is important to note that this paper focuses exclusively on the social reproduction channel of gender inequality. It is, therefore, not within the scope of this paper to consider gender inequality which arises from, for example, discrimination in the workplace or employment bias.

Given this limitation, I contend that Marx's Political Economy remains vital for an analysis of gender inequality. Marx's methodological approach provides us with a more complete understanding of the system's underlying economic and social conditions (Gimenez, 2015). This is because Marx focused on value that is created in the processes of production and reproduction, their relation to one another, as well as how these processes shape societal relations under capitalism (Marx, 1999 [1887]; Bhattacharya, 2017). Marx thus adopts a holistic approach to the study of the economy, contrary to the individualistic methodological components of neoclassical economics (Smith, 2007 [1776]). Neoclassical economics narrowly focuses on value created in the process of exchange, and thereby obscures the underlying relations that are pivotal to understanding gender inequality (Arruzza, Bhattacharya and Bhattacharya, 2017). Marx's understanding of the economy is not only vital for understanding the social conditions underlying capitalism generally, but also informs the social conditions that neoliberalism – capitalism's most recent stage of development – perpetuates (Fine and Saad-Filho, 2017).

Marx's work on social reproduction as a core component of the capitalist system of production gives us insights into how gender inequality is produced and reproduced. The concept of social reproduction, in Marxist terms, is a broad one. For the purposes of this paper, social reproduction includes work of a labour-intensive nature, such as "birthing and raising children, caring for friends and family, maintaining households and broader communities" (Fraser, 2017 p.21). In this paper, this broad set of social

activities is attributed to the term “care work”. Unpaid care work thus refers to work that is usually performed in the household.

Since Marx took for granted this form of unwaged labour that is involved in social reproduction, his work has been enriched by the social reproduction feminist movement.<sup>1</sup> Marxist-feminists have expanded Marx’s original understanding of the economy and brought to light the important role of care work as a condition of possibility of social reproduction and therefore of capitalism itself (Gimenez, 2005; Bhattacharya, 2017; Fraser, 2017). In order to reach this conclusion, Marxist-feminists have stressed the importance of applying a “unitary” approach to understanding the functioning of capitalism as a whole (Marx, 1999[1887]; Fraser, 2017; Murphy, 2015). In the absence of such a unitary approach, certain processes within the system of capitalism will be obscured (Bhattacharya, 2017). Importantly, focusing solely on the dynamics of economic processes, i.e. the market-mechanism, obscures the true exploitative character of capitalism (Bhattacharya, 2017).

The aim of this study is threefold. First, to uncover, theoretically, the gendered nature of care work within the system of capitalism and its relation to patriarchy and capitalist economic reproduction. Second, to understand how the feminisation of care work has produced gender inequality in the post-apartheid South African context, which I argue is characterised by neoliberalism. Third, to assess what the implications of the COVID-19 pandemic and the government’s fiscal policy response are for women and gender inequality in South Africa. I argue that the government should refuse plans to implement austerity as it will exacerbate gender inequality in South Africa. In doing so, I highlight that viewing austerity through a human-rights lens may be appropriate in light of the state’s constitutional mandate to progressively realise socio-economic rights – many of which concern women due to their prevalent caring roles in social sectors of the economy (Corkery and Isaacs, 2020).

This paper is structured as follows. Part One draws from Marx’s analysis of capitalist social relations, as well as the critical insights developed by social reproduction feminists. I do this in order to place unpaid care work within the system of capitalism as a whole, and to thereby illustrate its importance to the very functioning of the system itself. Part One aims to bring attention to the fact that the non-recognition of care work

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<sup>1</sup> See, for example, Dalla Costa and James (1975), Vogel (1983), Mies (1998), Folbre (2009), Federici (2012), Murphy (2015), Bhattacharya (2017), Fraser (2017) who have all contributed to this literature.

in mainstream economic theory is a source of women's oppression and the unequal gender outcomes that may be observed today, since unpaid care work is a highly gendered phenomenon. A Marxist feminist approach, with its focus on production and reproduction, provides the necessary tools for uncovering the social relations which produce and reproduce gender inequality (Saad-Filho, 2002 and Gimenez, 2005). This is why, in my view, this branch of economics presents a more fruitful means for understanding how gender inequality is perpetuated in society.

Part Two considers the channels through which unpaid care work contributes to gender inequality in post-apartheid South Africa. I consider how neoliberalism has influenced the processes of capital accumulation in this period and what the implications of this have been for the working class and for women in particular. The discussion shows that increased unemployment, precarious work, indebtedness, poverty and inequality have deteriorated working class conditions in the neoliberal era of capitalism. The gender dimension of each of these aspects of working-class conditions are considered in order to show that women have been adversely affected by these developments, more so than men, and to show the relation between these outcomes and the additional burden unpaid care work on women.

In Part Three, the impact that the COVID-19 induced economic crisis has had on women in South Africa is considered. I argue that women's greater involvement in the work of social reproduction is crucial to understanding the gender dynamics of the current crisis. This is done by considering three particular areas, namely, women's overrepresentation in healthcare services; women's participation in sectors that have been hit particularly hard by lockdown restrictions, and women's greater involvement in unpaid care work at home. The aim of this discussion is to highlight the need for a gender-sensitive economic policy response. Thereafter, focus turns to the government's fiscal response to the pandemic and how this will impact gender inequality. The main focus in this section will be on the gendered consequences of austerity measures. I argue that austerity would exacerbate gender inequality in South Africa, as it severely undermines social reproduction and the care work that women are disproportionately involved in.

## Part One: Care work and the exploitation of women within a Marxist Political Economy framework

### 1.1 Marx's analysis of capitalism

Capitalism understood within Marxism is at its core a social relation between those who own the means of production, the capitalists, and those who do not, the workers (Marx, 1999 [1887]). Marx notes that the distinction between these two classes of individuals has no natural or historical basis – it is purely a social construct of the system of capitalism (Marx, 1999 [1887]). The class division under capitalism emerged through the process of primitive accumulation, which describes the historical process by which direct producers were separated from the means of production (Marx, 1999 [1887]). The private ownership of the means of production allows the capitalist class to purchase labour power for the production of commodities to be sold on the market (Marx, 1999 [1887]). The process of primitive accumulation transformed direct producers into wage labourers, thereby producing the class division which underpins capitalism (Marx, 1999 [1887]; Whitehead, 2015). The means by which the wage labourers were separated from the means of production varies a great deal by geographical region (Glassman, 2006). Primitive accumulation in the Global North occurred differently to that in the Global South (Mies, 1998). In the Global South, the establishment of a class division occurred as a result of colonialism and imperialism (Mies, 1998; Whitehead, 2015).

In order to uncover the exploitative character of capitalism, it is necessary to understand the essential role of the labourer within this system, as well as how surplus value is created. Under capitalism, the primary objective is to transform money into capital, which occurs when surplus value is created (Marx, 1999 [1887]; Bhattacharya, 2017). If we accept Marx's assumption that the exchange value of a commodity can be reduced to the amount of time it takes to produce it, and thus the quantity of labour that is expended on it, then surplus value cannot be created by the mere exchange of commodities in the marketplace (Marx, 1999 [1887]). It can only be created during the production process i.e., when labour power is being put to work.<sup>2</sup> On the premise of

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<sup>2</sup> The central claim of Marx's labour theory of value is that the exchange value of a commodity is determined by the socially necessary labour time. However, it should be noted that this theory is not without critique. For example, Cohen posits that if this theory is true, then the amount of time required to produce a commodity in the past – and thus the amount of time actually spend producing it – is

Marx's assumption, surplus value derives from the difference between the value that the worker produces for the capitalist, and the value that the worker receives in return in the form of a wage (Marx, 1999 [1887]).<sup>3</sup>

There is clearly interdependence between the two classes: neither class can have their interests realised without the other (Wright, 2005). However, as a result of the unequal property relations between capitalist and worker, the capitalist, as the owner of labour power, is in a position to dictate the length of the work day, the working conditions and the wage. Therefore, the conditions under which the worker is maintained, and labour power itself reproduced, are dictated not by the worker, but by the capitalist (Marx, 1999 [1887]). It is this greater bargaining position which enables the capitalist class to appropriate the additional benefits derived from the production of surplus value (Bhattacharya, 2017). As such, when the working class generates surplus value, over and above what they receive in return for their expended labour, they do not benefit from it. Instead, this additional value is appropriated by the capitalist class, in order to accumulate capital.

The relationship between the two classes is thus characterized by exploitation, since the working class has no choice but to produce surplus value for the capitalist class, as this is the only means by which to achieve the worker's own self-development (Wright, 2005 and Bhattacharya, 2017). Since capitalism is geared towards unlimited capital accumulation, which can only be achieved by the uninterrupted appropriation of surplus value, exploitation becomes the sole means by which capitalism continues as a mode of production (Marx, 1999 [1887]). Exploitation, as Bhattacharya (2017) puts it, is thus the very "crux" of the capitalist economy when it is considered as a social relation.

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irrelevant to the true value of the commodity. This effectively means that certain commodities, which no longer require direct labour to produce it, would be valueless (see Cohen, 1979). Nonetheless, I contend the labour theory of value remains an important conceptual tool for understanding value as a social relation between, on the one hand, direct producers, and on the other hand, the physical relationship between commodities sold in the market. As such, it "traces the relations, structures, agencies and processes by which market forms emerge, evolve and are reproduced, and located them in their historically- and socially-specific contexts" (Fine and Saad-Filho, 2018, p.342). Marx's labour theory of value thus remains convincing, as value is not treated in isolation from the complexities of economic and social reproduction, and the process of capital accumulation, thereby incorporating not only a conceptual framework, but material reality (see Fine and Saad-Filho, 2018).

<sup>3</sup> See Marx's discussion on the distinction between necessary and surplus labour time. See Marx (1999 [1887], p.133-134)

## 1.2 Social reproduction as a necessary condition for capital accumulation

The process of capital accumulation assumes that the production process is uninterrupted, *ad infinitum*. If exploiting the working class's labour power is the sole means by which capital is accumulated, then the system is crucially dependent on the continued availability of human labour. In other words, the objective of capital accumulation assumes that there will always be workers who are readily available to sell their labour power (Marx, 1999 [1887]). The regeneration of labour power, in turn, requires the continuous maintenance of the working class (Bhattacharya, 2017). However, the daily maintenance of the worker is insufficient. In addition, what is required is the intergenerational reproduction of the entire labour force and indeed, of society as a whole. Social reproduction is therefore not merely incidental to the system of capitalism, but fundamental to it (Marx, 1999 [1887]; Lebowitz, 2003).

Understanding capitalism as a totality of various social and economic processes entails using the concept of social reproduction in this broader sense. This approach also reinforces the unique character of labour power – a commodity that needs to be replenished and eventually replaced, in a continuous circuit of production and reproduction (Bhattacharya, 2017). In the absence of social reproduction, there could be no society; no labourer, no economy and no surplus value for the capitalist (Fraser, 2017). Social reproduction is thus a condition of possibility for capitalism's goal of sustained capital accumulation (Marx, 1999 [1887]; Murphy, 2015).

It is important to stress the mutually constitutive nature of the social and economic processes underlying capitalism (Marx, 1999 [1887], p.119-123). On this basis, it would be futile to examine their existence in a "separatist" fashion, by marginalising the critical role of social reproduction to a separate "social" sphere, unencumbered by its relation to capital accumulation (Fraser, 2017; Bannerji, 2005). Rather, in order to grasp the true dynamics of the processes underlying capitalism, it is necessary to place both the economic and social realms within a single holistic framework. Treating the process of capital-accumulation as existing independently of the processes that a worker engages in in the comfort – or discomfort – of her own home, is tantamount to treating the growth of a tree as existing independently of the water cycle, the atmosphere or the soil of the earth in which it is placed. Understanding the system of capitalism as a complex but unified totality of processes not only gives insight into the exploitative character of the social structures comprising class relations, but also

illustrates how these structures organise gender relations in a society (Banerjee, 2005 and Gimenez, 2005).

### 1.3 The sexual division of labour and the gendered nature of care work

Capitalism creates the capitalist class and the working class. However, the latter is not a homogenous group – other than the shared feature of exploitation that all workers are subjected to. The stratifications within the working class often stem from various divisions in the type of labour that different workers engage in (Bohrer, 2019). An investigation into the divisions of labour may be illustrative of the ways in which the system of capitalism relies on certain social norms and stereotypes for its functioning (Bohrer, 2019). On this basis, observing how men and women differ in their positions in the work that they occupy is useful in understanding how unequal gender relations, rooted in patriarchal systems of production, are perpetuated under capitalism.<sup>4</sup>

Patriarchy has influenced the type of work that women participate in for centuries, even in pre-capitalist modes of production (Folbre, 2009).<sup>5</sup> Prior to capitalist production, the labour of women's work was under control of men within a hierarchical structure in the family (Hartmann, 1976). Some anthropologists have emphasised that women have historically been confined to domestic work (Hartmann, 1976).<sup>6</sup> In this regard, the universality of patriarchy has been argued to be rooted in the fact that – due to their biological role in human reproduction – women naturally fulfil a mothering role (Ortner, 1972). Other schools of thought have rejected this in theory.<sup>7</sup> There is thus some debate on whether the division of labour between men and women in the household has always been male supremacist, placed in a hierarchical structure of control, or whether this division was at some point in time egalitarian in nature (Draper, 1975).

Engels explains that the subjugation of women arose at a particular stage of social development which, in time, became increasingly institutionalised with the advent of commodity production, private property, the monogamous family unit with its male

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<sup>4</sup> See Federici (2012) for a discussion on the New International Division of Labour, p.66-68.

<sup>5</sup> See also Mies (1998), p.37-38 for a brief note on different interpretations of patriarchy under capitalism.

<sup>6</sup> See, for example, Ortner (1972).

<sup>7</sup> See the “feminist-revisionist” and the “variationist” schools of thought on the historical origins of the sexual division of labour (Hartmann, 1976, p.142).

household-head, and the state (Engels, 1884). Engels therefore sought to contradict the notion that women's oppression stems from some natural basis, and set out instead to provide a social explanation for its emergence. Mies (1998) argues, successfully in my opinion, that the sexual division of labour that exists under capitalism has no natural basis. According to her, patriarchal systems that exert control over women and their labour do not exist in parallel to the system of capitalism, but are essential to its functioning (Mies, 1998). Indeed, Engels points out that the division of labour within the family unit played an important role in regulating the division of property between the men and women (Engels, 1884 p.88). Legal inequality between men and women was thus not the cause but rather the effect of women's economic oppression (Engels, 1884 p.39). The division of labour within the family may therefore be understood as a system of direct and personal control, not only of women's labour but also of their bodies and reproductive choices (Hartmann, 2009 p.138; Firestone, 1970 p.11).

Once capitalism emerged and the sphere of production became increasingly separated by a private and public domain, the system of control over women became impersonalised, mediated not only directly by husbands, but indirectly by society-wide institutions (Hartmann, 1976).<sup>8</sup> Legal institutions, for example, prevented women not only from owning property but also from partaking in wage labour. This institutionalised patriarchy in (at least) three ways. Firstly, as women had no means by which to ensure their own subsistence, they were forced to marry, which subjected them to the control of their husbands, thereby maintaining the traditional structure of control within the family unit (Folbre, 2009).<sup>9</sup> Secondly, women's confinement to the private sphere meant that the sexual division of labour could be maintained, entrenching "women's work" as work that takes place in the household and not in the public domain (Hartmann, 1976). Thirdly, through the delineation of a private and public sphere, and the placement of men in the latter, the public sphere came to be valued more as capitalist production progressed, thereby diminishing the value of women's work to the extent that it became invisible (Folbre, 2009).

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<sup>8</sup> Hartmann (1976) argues that specific mechanisms were used by men to subject women's labour to their control, namely, mechanisms traditionally available in the division of labour and techniques of hierarchical organisation and control, p.138-139.

<sup>9</sup> Engels (1884) notes that the word "family" originated from Latin "familia", which referred to the total number of slaves that belonged to one man, p.31.

Furthermore, the view that care work is “unproductive” may be associated with capitalism’s ideological pillar of self-interest, which, it has been argued, had the effect of reducing the social recognition of care work, since it is done primarily for the benefit of others (Reynard and Clark, 1920). From this perspective, it could be argued that the growth of individualism in capitalist society had adverse effects on women in their capacity as mothers and wives, because it weakened the recognition of work not conducted for individual gain (Reynard and Clark, 1920; Folbre, 2009 p.4).

Oppressive patriarchal structures that placed women and their labour in a subordinate position to men became increasingly interwoven within the capitalist mode of production (Mies, 1998). It is argued that the sexual division of labour, particularly in a hierarchal structure within the modern family, may be understood as the historical cause of the sex-segregated labour market structures – and the vastly different economic positions that women and men find themselves in – that persist today. This is plausible as it is only in the last half a century that women’s role in society has really transformed, with the attainment of equal civil rights and economic freedoms, and the associated increase in participation of women in waged labour. Indeed, many countries in the world today have made significant strides in empowering women and reducing the gender-wage gap (World Economic Forum, 2020).

However, despite notable progress having been made in women’s participation in the labour market, it is still the case, especially in many low and middle-income countries, that women are overrepresented in sectors of the economy that are associated with care work, such as domestic work, education and health care sectors (International Labour Organisation, 2018). In addition, social norms surrounding unpaid care work persist (International Labour Organisation, 2018).<sup>10</sup> This is perhaps indicative of a much broader cultural shift that is needed, away from the heteronormative views of the family unit that still dominate over social reproduction, and that which cannot necessarily be solved through economic policy alone (Firestone, 1970 p.10-11).

The persistence of social norms surrounding care work has resulted in a “double burden” on women in modern capitalism: to provide for themselves through participating in undervalued paid labour, and to provide for their dependents and maintain households in their “free” time without compensation (International Women’s

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<sup>10</sup> Part Two will show that this is indeed the case in South Africa.

Development Agency, 2016). Women's oppression under the system of capitalism thus stems from the manner in which social reproduction is marginalised by the process of capital accumulation, which is considered in more detail below.

#### 1.4 The subordinate position of women under capitalism

The underlying processes of capitalism are positioned in a manner that is both symbiotic yet contradicting in nature, with negative consequences for women due to their greater role in social reproduction. The contradicting nature of capitalism stems from the incompatible objectives of the two different classes of individuals that capitalism creates. On this, Lebowitz (2003, p.127) notes that there are two different goals in the system of capitalism, based on two different perspectives of the value of labour power: for the capitalist, labour power is the means by which surplus value is created, while for the labourer, it is the means for satisfying self-development through the process of social reproduction.

However, despite the interdependent nature of the processes necessary to attain both of these goals, the process of capitalist production necessarily "exists for the valorization of capital and not the social development of labor" (Bhattacharya, 2017, p.82). Effectively, the weaker bargaining position of the working class under capitalism places the goal of self-development – and therefore the processes of social reproduction – in a subordinate position to the goal of appropriating surplus value (Bhattacharya, 2017). It follows that the mode of economic production creates the conditions of possibility of social reproduction (Gimenez, 2005).

Given the broad nature of social reproduction, the processes that it entails are expansive. It includes a key set of social processes – activities, behaviours, responsibilities and relationships – that are directly involved in maintaining life both daily and intergenerationally (Laslett and Brenner, 1989, p.382). Practically, this involves "birthing and raising children, caring for friends and family, maintaining households and broader communities" (Fraser, 2017, p.21). The processes underlying social reproduction are therefore complex. They extend far beyond cooking and cleaning – which are already time consuming tasks that require much physical effort – to include the emotional activities necessary to foster human relationships (Dalla Costa and James, 1975). For the purposes of this paper, this broad spectrum of activities are attributed to the umbrella-term "care work".

Social reproductive feminism has developed important insights into the political economy of capitalism, emphasising how the care work of social reproduction is a condition of possibility to meet the objective of producing and accumulating surplus value under capitalism (Ferguson, n.d.). Yet, the subordinate position of social reproduction to capitalist production undermines the role of care work. Despite being an integral part of the system, care work is treated in mainstream economic theory as invisible; as if occurring outside the circuit of production (Bhattacharya, 2017). Indeed, care work that takes place in the home is not attributed any value under capitalism (Dalla Costa and James, 1975).<sup>11</sup> On this, Bhattacharya notes that it is only within the home where the work of social reproduction remains unwaged (Bhattacharya, 2017).

This work, including but by no means limited to housework, has been imposed upon women as a duty; it is work that is not recognised as work, but rather as a natural attribute of what it means to be a woman – an extension of the female identity (Federici, 1975). Federici (1975) argues that waging this work would revolutionise the way in which society views the role of women: by recognising care work as work, and making it visible, women are provided with the choice to refuse such work, thereby eroding the gender norms associated with it and challenging the underlying social relations within capitalism that have produced and reproduced the oppression of women.

Whether or not social reproductive work should be waged is the subject of much debate, however, as it raises important questions on the extent to which the economic domain is capable of ameliorating the multi-faceted sources of oppression that women are faced with (Hester, 2018).<sup>12</sup> Overall, social and economic policy may not be sufficient; what may be required is a much deeper structural transformation of the social order, as argued by Fraser (2017). Although I agree with this, I do not believe that holding this view necessarily excludes the role, however minor it may be, that economic policy should play in changing how society views care work. As Selma James (2021) correctly points out, women's function in society as caregivers is already institutionalised through the feminisation of poverty and the continued financial

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<sup>11</sup> This is a direct result of the deeply embedded patriarchal structures that preside within the system of capitalism and the sexual division of labour considered above (see Federici, 2012; Folbre, 2009; Mies, 1998 for a further discussion).

<sup>12</sup> It also raises practical concerns on how to measure social reproductive work, particularly the nuanced and emotional aspects of it which do not have the clear boundaries that paid employment has. See Mehta and Mitra (2021).

dependence of women on men – outcomes of the burden of care which falls disproportionately on women relative to men. From this point of view, economic recognition of care work through some form of compensation could empower women. Furthermore, viewed politically as Federici (1975) argues, it could be a useful tool in challenging the underlying social norms that confine more women than men to this form of labour.

Exceptions where care work is already waged take the form of, inter alia, a public schooling system, public health care, or where this work has been commodified for those individuals who can afford it (Fraser, 2017). In the latter case, this typically takes the form of a worker who looks after the children, or who cleans the house. However, for the large proportion of the global population who cannot afford the luxury of purchasing the labour power necessary to complete care work on their behalf, or where public service delivery is severely constrained – for example, by austerity policies – the processes of social reproduction become reduced to work that is simply expected to be done without compensation, and predominantly so by women due to the interwoven nature of persistent patriarchal norms under capitalism (Fraser, 2017).<sup>13</sup> In describing the role of women under capitalism, Federici (1975 p.78) remarks on the “peculiar combination of physical, emotional and sexual services” that are characteristic of unpaid care work, and which make it both burdensome and invisible.

By continuously marginalising care work within the system of accumulation, capitalism has created limited conditions of possibility for social reproduction (Gimenez, 2005). Simply, if a worker’s salary is insufficient to support children, this significantly impedes that individual’s capacity to have children (Gimenez, 2005). Alternatively, if a woman has children, but her wage does not afford her the opportunity to outsource the labour power required to care of her young children, then she is significantly constrained in her capacity to hold a full-time job. Precarious employment, a widespread phenomenon under neoliberal capitalism, in turn, does not provide a stable income for a woman, which significantly undermines her capacity to provide for her children in the future.

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<sup>13</sup> The gendered consequences of austerity in the South African context are considered in detail in Part Three of this study.

These examples illustrate the domination of capital over care work, and how capitalism undermines the reproduction of the commodity that the system itself relies on the most: labour power (Bhattacharya, 2017, p.80). Importantly, by instilling the hegemony of capital accumulation above the self-development of the worker, the system of capitalism undermines the social processes that are necessary to sustain it (Saad-Filho, 2002). Given this inherent contradictory nature of capitalism, unlimited capital accumulation has a tendency “to destabilise the very processes of social reproduction on which it relies” (Fraser, 2017, p.22).

### 1.5 Concluding thoughts

Women, like men, are already exploited under the system of capitalism when they enter into the working class. However, unlike men, women are subjected to additional exploitation, which takes the form of unpaid care work. This work forms part of a broader process of social reproduction, which is a necessary condition for sustained capital accumulation. However, patriarchal structures that exist within the system of capitalism have marginalised the role of care work to a separate “social” sphere as if it exists outside of the circuit of production. A Marxist-feminist approach provides us with the analytical tools to view the economic and social processes underlying capitalism within a single holistic framework. On the one hand, this exposes the exploitative nature of capitalist class relations. On the other hand, it exposes the subordinate position of women under capitalism due to their greater role in social reproduction. The implications of not recognising care work and how this relates to gender inequality is discussed below in the context of South Africa and the neoliberalised form that capitalism takes on today.

## Part Two: Gender inequality and its relation to the feminisation of care work in neoliberal South Africa

The specific nature of capital accumulation in South Africa has shaped the impact of neoliberalism in significant ways, with particularly detrimental consequences for working class women. First, neoliberalism and its core component, financialisation, is briefly defined from a Marxist perspective. Part Two then proceeds to consider the manner in which financialisation has deteriorated working class conditions and how

women in particular have been impacted. This part of the study is primarily concerned with deconstructing various dimensions of gender inequality in South Africa and considering their relation to the feminisation of unpaid care work. It is argued that the deterioration of working-class conditions under neoliberal policy interventions and corporate restructuring have affected women more adversely in comparison to men, as a direct result of the additional care responsibilities that fall disproportionately on them.<sup>14</sup> In this manner, it is shown that the feminisation of the burden of care, particularly in the context of neoliberalism, acts as a driver of gender inequality in South Africa.

## 2.1 Neoliberalism defined from a Marxist perspective

In accordance with the Marxist tradition, neoliberalism may be viewed as the most recent stage of the capitalist mode of production (Fine and Saad-Filho, 2017). Hence, for the purposes of this paper, neoliberalism is the material structure of social, economic and political processes that currently drive production and reproduction of capital (Fine and Saad-Filho, 2017, p.686). This structure is most notably characterised by the significant role that financialisation has come to occupy in the global accumulation of capital (Fine, 2013). Broadly speaking, financialisation is the term used to describe the way in which the process of capital accumulation has evolved under neoliberalism.<sup>15</sup> More specifically, it describes the dramatic increase in the prevalence and scope of finance capital in this process, also referred to as 'interest-bearing' or 'fictitious' capital in Marxist terms (Fine, 2013, p.55).<sup>16</sup> Thus, the present era of neoliberalism may be characterised by the fact that the process of capital accumulation is dominated by the money circuit through the use of finance capital, as opposed to productive capital. The degree to which a country is financialised is an empirical question and must be established on a case-by-case basis. As this study is only concerned with the South African case, it is important to bear in mind that the discussion below is context specific and will therefore differ

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<sup>14</sup> As mentioned in the introduction, this paper focuses exclusively on the social reproduction channel of gender inequality.

<sup>15</sup> Since financialisation has occurred to varying degrees across the globe, it has been understood, and therefore defined, in different ways (see Fine and Saad-Filho, 2017, p.691). It is not within the scope of this study to consider the multitude of understandings financialisation has been subjected to. For the purposes of this study, its definition is confined to a Marxian understanding.

<sup>16</sup> See Marx, 1999 [1887] Volume III, chapter 25.

significantly in the context of advanced economies where financialisation is more pronounced.

## 2.2 Neoliberalism and financialisation in post-apartheid South Africa

The newly elected ruling party of South Africa, the African National Congress (ANC), actively implemented neoliberal-type policy reforms with the introduction of the Growth, Employment and Redistribution (GEAR) programme in 1996 (Department of Finance, Republic of South Africa, 1996). At the centre of the policy agenda was macroeconomic stability, specifically through monetary policy in the form of inflation targeting and, in the area of fiscal policy, public debt stabilisation through the exercise of fiscal restraint (Department of Finance, Republic of South Africa, 1996).<sup>17</sup> Overall, GEAR was characteristic of orthodox macroeconomic policies rooted in market fundamentalism and thereby promoted liberalisation of trade and international capital flows (Department of Finance, Republic of South Africa, 1996).<sup>18</sup>

These policy changes were introduced in an industrial structure inherited from the apartheid era which has been skewed towards 'heavy' industry, comprising of mining, energy and finance (Terreblanche, 2016, p 376). Since the 1970s, these industries have contributed 50% to 62% of total manufacturing output (Newman, 2017). The dominance of these industries – and the conglomerates that comprise them – have been well documented in the literature on South Africa's industrial development, and is commonly referred to as the "Minerals-Energy Complex" (MEC) (Fine and Rustomjee, 1996). The MEC characterises the non-diversified system of accumulation which is unique to the South African political economy (Ashman, Fine and Newman, 2011).

The dominance of capital-intensive industrial growth in the economic system has shaped the manner in which financialisation has impacted working class conditions in

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<sup>17</sup> Neoliberal restructuring was rooted in the Washington Consensus (1989) which, in line with neoclassical economics, promoted market fundamentalism and limited intervention by the state. See Birdsall, de la Torre and Caicedo (2010, p.8) for an overview of neoliberal-type policy reforms promoted under the Washington Consensus. See also Fine and Saad-Filho (2017, p.692) for the assumptions underpinning these economic policies.

<sup>18</sup> It is interesting to note that GEAR represented a sharp movement away from earlier policy initiatives of the ANC, based on the Freedom Charter, which placed great emphasis on growth through redistribution and rejected market fundamentalism and the view of "trickle-down" economics which was promoted under neoliberalism. For further reading on the evolution of the ANC's economic policy, see van Niekerk and Padayachee (2019).

South Africa. This is because financialisation in South Africa has resulted in corporate restructuring which has contributed to a decline in long term productive investment (Newman, 2017). Corporate restructuring refers to the unbundling of production activities, a shift in focus to 'core competences', downsizing and the increase in outsourcing non-core activities (Ashman, Fine and Newman, 2012). This means that firm performance has been separated from productive expansion and is instead closely linked to profitability through its direct link to share prices (Ashman, Fine and Newman, 2012).

This has led to a decline in the contribution of the manufacturing sector to overall GDP in the post-apartheid era. In 1994 it contributed 20.9% to GDP and by 2012 this figure had declined to 12.4% (Industrial Development Corporation, 2013).<sup>19</sup> In 2017, the growth rate of manufacturing value added to overall GDP declined by 0.2% in 2017, increased by 1% in 2018 and decreased again by 0.8% in 2019 (Statista, 2021). Furthermore, the year-on-year percentage change in volume of manufacturing production declined drastically by nearly 50% following the COVID-19 pandemic and lockdowns in March of 2020 (Stoddard, 2021).

### 2.3 The gender dimensions of deteriorating working class conditions under financialisation

The trend of deindustrialisation in South Africa from the lack of productive investment has resulted in deteriorating working class conditions, most noticeable in the following five features of the economy. These are, persistently high levels of inequality and poverty, high levels of unemployment, indebtedness and a rise in precarious work. The discussion below highlights the gender dimension of each of these developments in order to illustrate women's unequal position in the South African economy currently. Thereafter, a relationship between gender inequality and the feminisation of care work is established. Overall, the following two sections show how women's greater involvement in social reproduction acts as a driver of gender inequality, particularly in the context of financialisation in South Africa.

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<sup>19</sup> Over the same period, the contribution of the financial sector (including insurance, real estate and business services) increased from 16% to 21.5% of GDP, see Industrial Development Corporation (2013).

### 2.3.1 Poverty and inequality in post-apartheid South Africa

Income and wealth inequality in the post-apartheid era in South Africa have been persistently high (Statistics SA, 2019). Figure 1 below shows that, between 1993 and 2008, the Gini coefficient for per capita household income increased from 0.68 to 0.69, and decreased to 0.66 in 2014 (Hundenborn, Leibbrandt and Woolard, 2018). The Gini coefficient for wealth inequality is substantially higher and is estimated at 0.94 (Statistics SA, 2019). Decomposing this measure across different forms of income reveals that inequality across per capital labour income is notably higher than for total household per capita income (see Figure 1). Income derived from investments appears to be concentrated amongst a very small proportion of the total population, since the Gini coefficient is consistently higher than 0.97 in the first decade of the constitutional era in South Africa (see Figure 1). Comparing inequality in expenditure across men and women also reveals major disparities (see Figure 2 below).

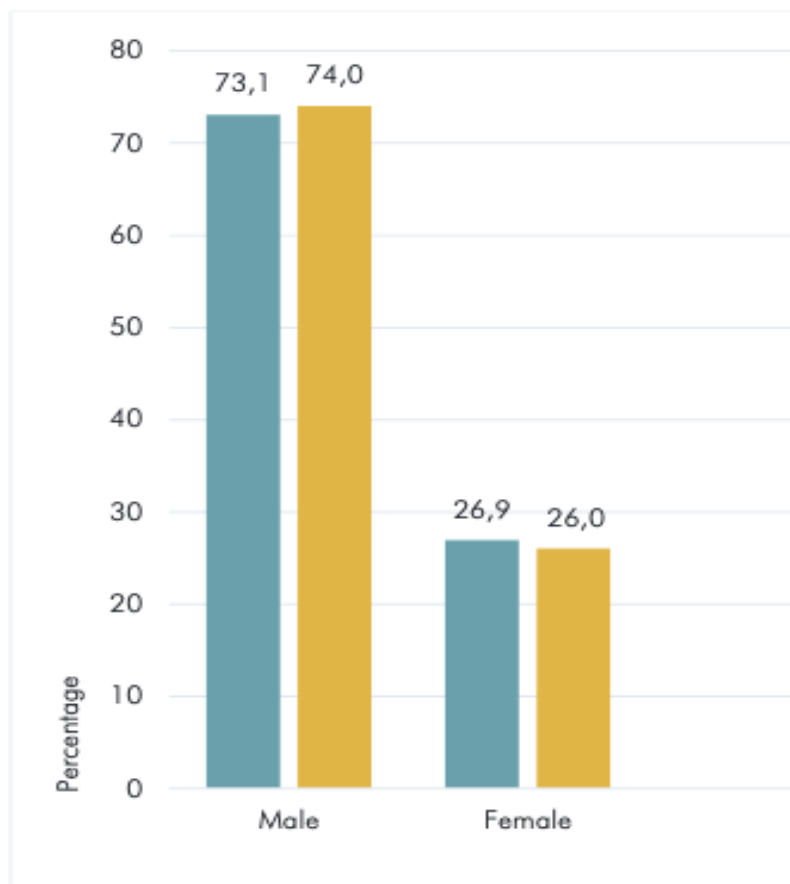
Figure 1: Gini coefficient for per capital household income by income type (1993, 2008 and 2014)

Variable	1993	2008	2014
<b>Total household (HH) income</b>			
Mean of HH income	1,328.17	2,062.68	2,398.57
Gini of HH income	0.68	0.69	0.66
<b>Labour income</b>			
Mean of labour income	1,078.18	1,659.86	1,971.98
Share in total HH income	83.6%	74.5%	73.0%
Proportion of HHs receiving labour income	60.5%	64.4%	72.6%
Gini of labour income	0.73	0.76	0.73
<b>Income from government grants</b>			
Mean of government grants	86.17	161.31	187.34
Share in total HH income	3.4%	15.6%	16.4%
Proportion of HHs receiving government grants	23.5%	56.3%	68.0%
Gini of government grants	0.92	0.78	0.76
<b>Income from remittances</b>			
Mean of remittance income	50.56	86.69	93.94
Share in total HH income	4.6%	3.6%	6.1%
Proportion of HHs receiving remittances	22.2%	13.9%	38.3%
Gini of remittances	0.91	0.97	0.91
<b>Investment Income</b>			
Mean of investment income	113.28	154.81	145.31
Share in total HH income	8.3%	6.3%	4.5%
Proportion of HHs receiving investment income	3.5%	5.6%	23.3%
Gini of investment income	0.99	0.97	0.98
N_unweighted	39,180	28,225	37,965
N_weighted	39,020,805	49,295,750	54,941,051

Source: authors' calculations using PSLSD and NIDS weighted data.

(Hundenborn, Leibbrandt and Woolard, 2018)

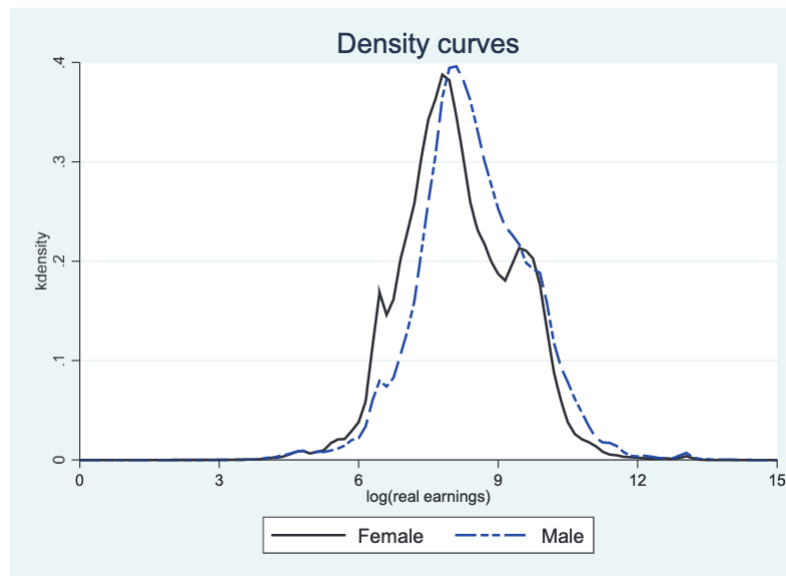
Figure 2: Distribution of expenditure shares by sex (2006 and 2015)



(Statistics SA, 2019)

Figure 2 shows that the share of expenditure of female-headed households is significantly lower compared to male-headed households. Between 2006 and 2015, the expenditure for female-headed households declined slightly, while that of male-headed households increased. Figure 3 below shows the trend for earnings across sexes during the period 2011 to 2015. This reveals that, on average, women earn approximately 30% less than men when they are employed, which is indicated by the curve for females lying to the right of the curve for males (Statistics SA, 2019).

Figure 3: Kernel density plot of log real monthly earnings by sex (2011-2015)

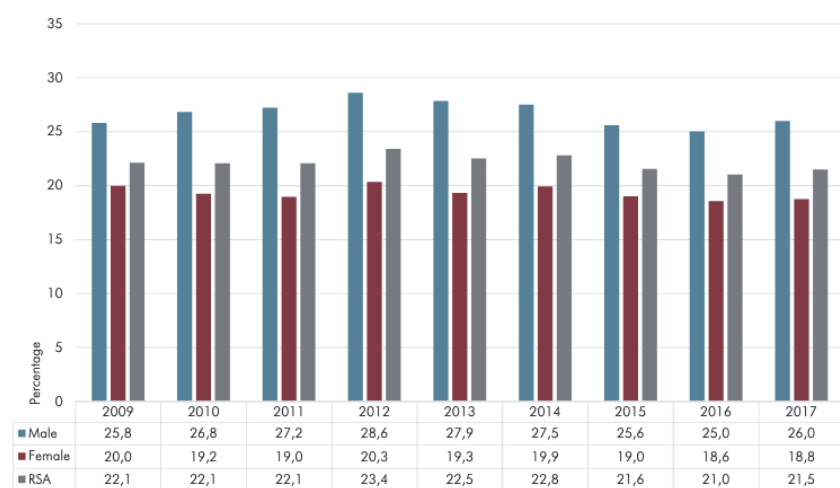


(Statistics SA, 2019)

In addition to wage inequality, social inequality in South Africa also reveals disparities across genders. Social inequality arises when there are disparities in the provision of social services, such as public schooling, healthcare, water, electricity as well as household assets, such as stable internet and appliances (Oxfam South Africa, 2020). In 2009, 2011 and 2015, male-headed households had greater access to basic services and household assets - including running water, electricity, formal dwelling, flushing toilet, washing machine, computer and internet – than female-headed households (Statistics SA, 2019).

In 2015, approximately 36% of all households owned a washing machine and 12% had access to the internet (Statistics SA, 2019). This suggests that very few female-headed households relative to the population have access to services which assist them in the work of social reproduction. It is important to bear in mind that poor households are far more likely to lack access to such services and household assets. For example, at the lowest quintile of the income distribution, and between the period 2011 to 2015, only 52% to 56% of households had access to running water on the premises (Statistics SA, 2019). In terms of healthcare, Figure 4 below shows that less women compared to men have access to medical aid, (Statistics SA, 2019).

Figure 4: Proportion of population with access to medical aid by sex (2009-2017)



(Statistics South Africa, 2019)

In South Africa, there is also a gender dimension to poverty. Zizzamia, Schotte and Leibrandt (2019) have shown that 85.3% of all South Africans have experienced a poverty spell during 2008 and 2017, and that more than a third of the population remains consistently below the poverty line. Persisting levels of poverty disproportionately affects Black individuals; those living in rural areas; those that have low levels of educational attainment, and female headed households (Zizzamia, Schotte and Leibrandt, 2019; Statistics SA, 2019). Indeed, evidence suggests that children residing with only their mother are more likely to live in poverty, than if they lived with their father (Posel and Rudwick, 2013).

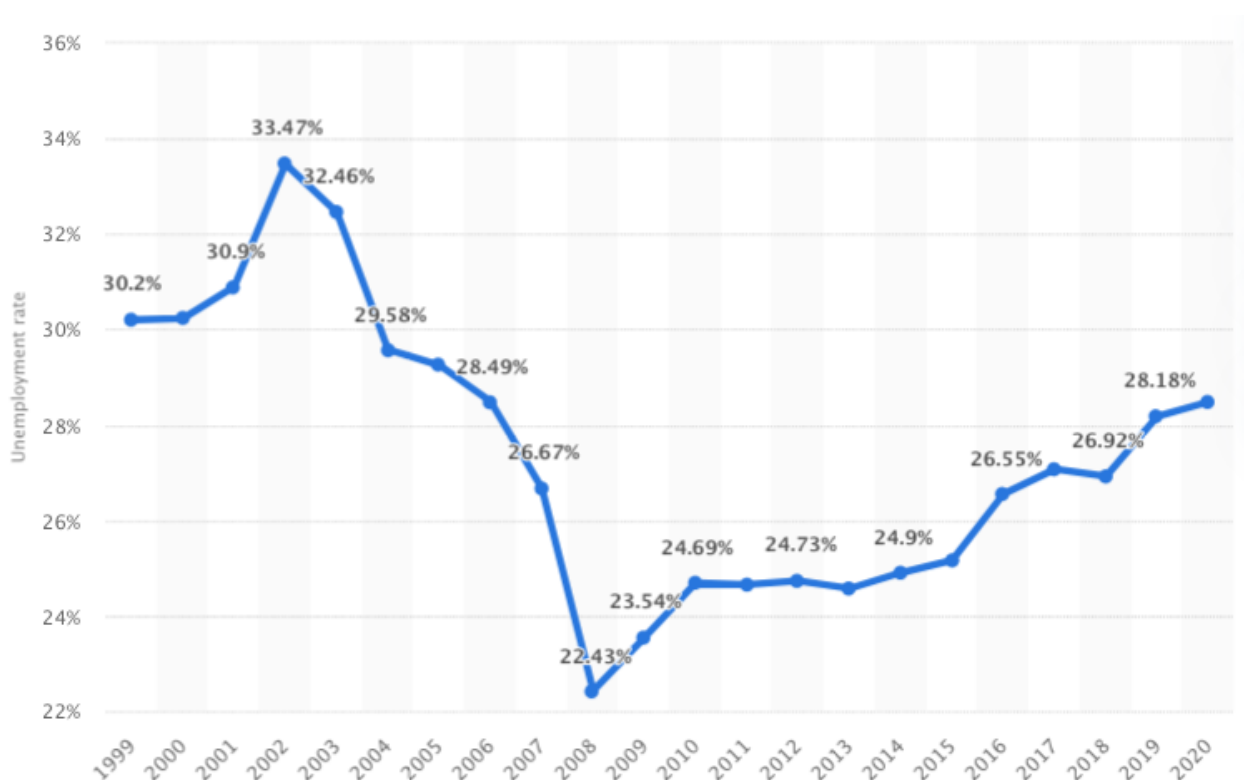
### 2.3.2 Unemployment

The lack of labour-intensive industrial growth, in part due to investment being increasingly channelled into the MEC, has contributed significantly to deeply entrenched levels of unemployment in South Africa (Terreblanche, 2017).<sup>20</sup> During 1994 and 2002, over one million workers in the formal sector lost their jobs (Ashman, Fine and Newman, 2012). The level of unemployment reached a peak in 2002 at 33.5% and declined to about 22% in 2008, prior to the onset of the financial crisis

<sup>20</sup> While the MEC has strong linkages with each other, these industries have weak linkages with other sectors in the economy. Thus, the promotion of these core industries by the state has heavily influenced, and in many ways constrained, the growth of other sectors in the economy. See Newman (2017, p.12).

(Statista, 2021).<sup>21</sup> Thereafter, unemployment has risen quite steadily. From the first quarter of 2011 to the last quarter of 2014, the official unemployment rate fluctuated between 23.8% and 25.5% (Statista, 2021). From the first quarter of 2015 to the first quarter of 2019, it ranged between 25% and 27.7% (Statista, 2021; see Figure 5 below). Between March and June 2020, over 2 million people lost their jobs following the COVID-19 pandemic and the associated lockdown policies that were implemented in an attempt to curb the spread of the virus (Statistics SA, 2021; Francis, 2020, p.103).

Figure 5: Unemployment rate in South Africa (1999-2019)

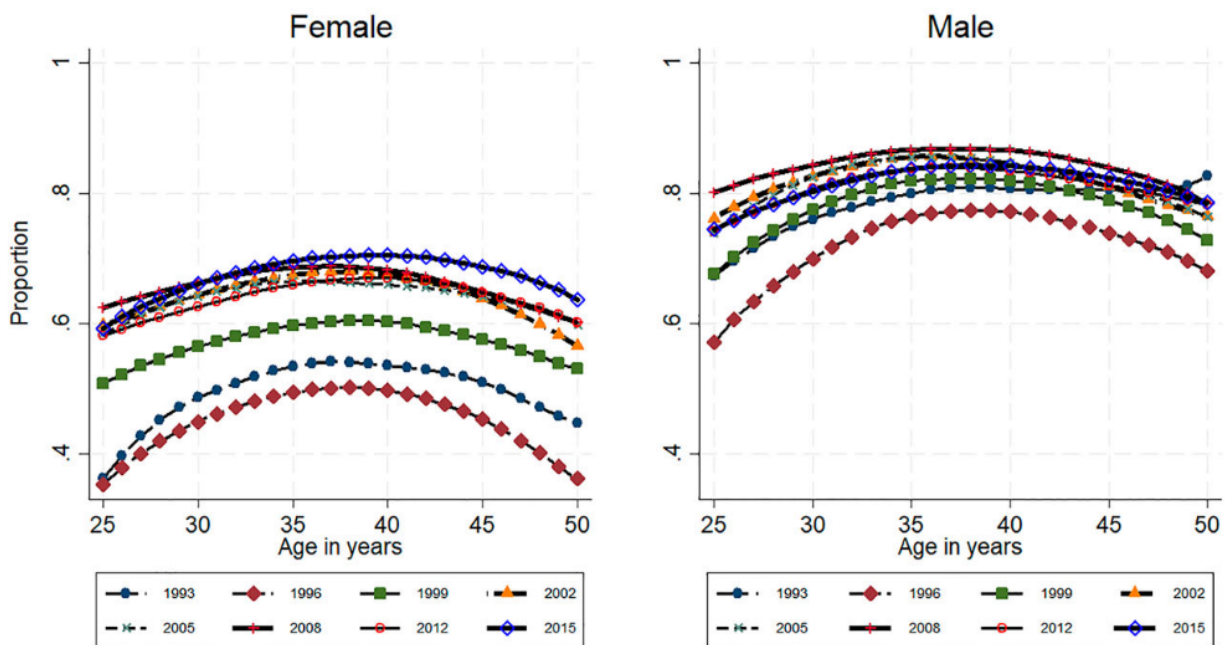


(Statistics SA, 2021)

<sup>21</sup> This is according to the narrow (official) definition of unemployment in South Africa which refers to the proportion of the working age population who are without employment and who are actively seeking employment.

Women’s labour force participation has increased in the post-apartheid era, although it still remains lower than that of men’s (see Figure 6 below, Mosomi, 2019; Gibbons, Poelker and Moletsane-Kekae, 2017). Evidence shows that unemployment rates have increased in recent years, and for women more so than men (see Figure 7 below, Mosomi, 2019). More recent estimates show that throughout the period 2011 to 2017, the unemployment rate for women was higher, ranging between 27.3% and 29.6%, than that for men, which ranged between 22.7% and 25.7% (Statistics SA, 2019).

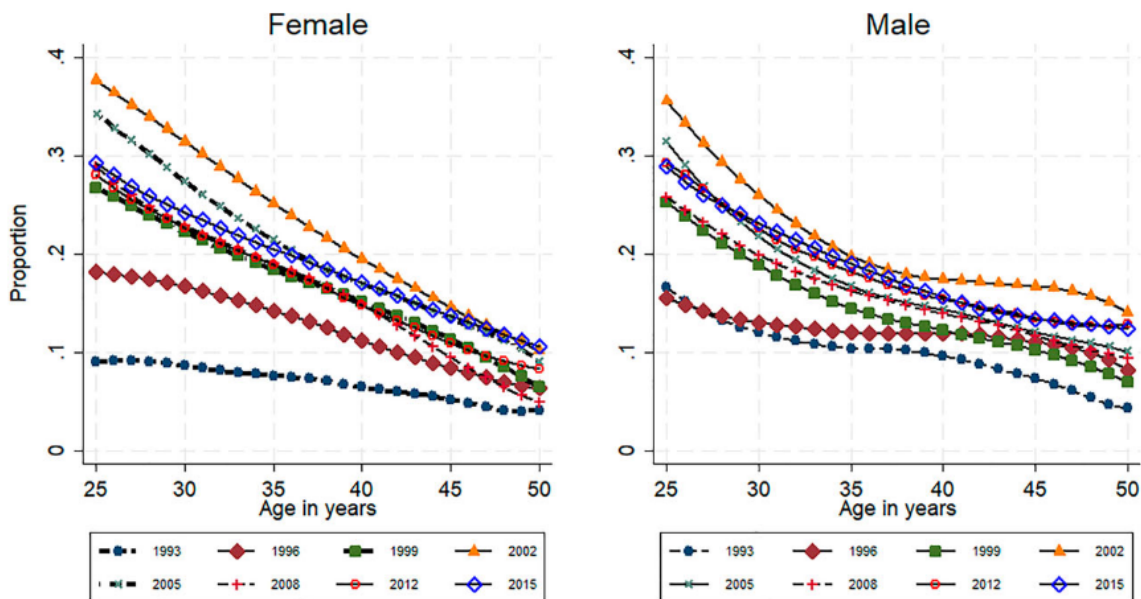
Figure 6: Proportion of economically active working-age population by sex and age (1993-2015)



Sample contains individuals aged between 25-50 years  
 Calculated from PALMSV3.1  
 All Surveys weighted using Cross Entropy weights

(Mosomi, 2019)

Figure 7: Proportion of the working-age population unemployed by sex and age (1993-2015)



Sample contains individuals aged between 25-50 years  
 Calculated from PALMSV3.1  
 All Surveys weighted using Cross Entropy weights

(Mosomi, 2019)

Furthermore, men who are not economically active (NEA) have a 27.2% likelihood of finding employment, whereas for NEA women this figure drops to 20.4% (Statistics SA, 2019). Similarly, for those searching for work, men have a 39.2% chance of finding employment, which is considerably higher than for women, who only have a 27.1% chance (Statistics SA, 2019). In addition to this, men are more likely to keep regular employment, or to transition into regular employment from being self-employed in the informal sector (Statistics SA, 2019). Overall, compared to men, women in South Africa are less likely to find work, more likely to lose work if they have it, and more likely to earn less than men when employed.

### 2.3.3 Indebtedness

Once financial motives started to penetrate non-financial sectors, social reproduction itself has become increasingly financialised (see Fine, 2013, p.55). A wide range of financial services, such as mortgages and insurance schemes, have now been designed to shift the provision of social reproduction from the state to the market and directly onto families (Fine, 2013). The effect has been a promotion of the

individualisation of care work (Himmelweit, 2017). This has been the case in South Africa and globally, although to varying degrees. In South Africa, capital account liberalisation expanded capital inflows of a short-term nature (Mohamed, Ashman and Newman, 2013). Short-term capital inflows have been channelled primarily into financial speculation and have facilitated the extension of credit to households (Ashman, Fine and Newman, 2011).

The latter has contributed significantly to high levels of consumer debt (Ashman, Fine and Newman, 2011). From 1990 to 2002, domestic credit as a percentage of GDP fluctuated between approximately 55% and 65% (Ashman, Fine and Newman, 2011). However, within a five-year period, from 2004 to 2008, this figure increased from just below 70% to 87% of GDP (Ashman, Fine and Newman, 2011). Over 90% of this has been channelled into domestic consumption (Ashman, Fine and Newman, 2011). The implications of this may be observed in the prevalence of indebtedness in the post-apartheid era.

At all levels of the income distribution there has been increasing indebtedness among households, although the impact of this on consumption patterns differs tremendously along the distribution (Newman, 2017, p.12). For poor and low-income households, the rise in flexible working conditions and suppressed wages have meant a greater reliance on credit to satisfy consumption needs (Newman, 2017). This also means that disposable income has been reduced in order to satisfy debt payments (Engelbrecht, 2014). Meanwhile, for households at the top of the income distribution, the effect of financialisation has been an increase in the reliance on dividends and interest payments from financial assets to fund current and future consumption (Newman, 2017). The implications of this for income and wealth inequality in the country have been significant and, as illustrated above in section 2.3.1, women are economically worse off than men.

#### 2.3.4 Precarious work

Liberalised international capital flows and high domestic interest rates have, on the one hand, led to a reduction in long-term capital inflows and, on the other hand, expanded capital inflows of a short-term and speculative nature (Newman, 2017). The latter development has increased macroeconomic instability in South Africa (Mohamed, Ashman and Newman, 2013). The frequency of economic cycles has, in

turn, fuelled growth in the service sector of the economy, since the procyclical nature of real investment has expanded service sectors of the economy during upswings (Mohamed, Ashman and Newman, 2013). Overall, these developments have contributed greatly to a shift in the distribution of employment, such that low- and medium-skilled workers have become more prevalent in low paid, precarious service sectors of the economy in the post-apartheid era (Newman, 2017, p.13). In South Africa, between 2014 and 2017, growth in precarious employment increased by approximately 10 percentage points (Oxfam South Africa, 2020).

Working class conditions have been increasingly characterised by informality and precariousness, which has placed downward pressure on wages in low-skilled sectors (Oxfam South Africa, 2020). Prior to the COVID-19 pandemic in 2020, there were approximately 5 million informal workers in South Africa (Francis, Valodia and Webster, 2020). Informal and precarious workers have no protection in terms of labour legislation (Francis, Valodia and Webster, 2020).<sup>22</sup> In South Africa, women are more likely than men to work in precarious conditions (Statistics SA, 2018).<sup>23</sup>

One specific example of precarious employment in South Africa is domestic work, which employs an estimated 1.1 million workers (Oxfam South Africa, 2020). More than 75% of domestic workers employed in private households are women, making it a highly gendered form of precarious work (Oxfam South Africa, 2020). The vast majority of domestic workers, nearly 99%, do not have formal employment contracts, which places them in a weak bargaining position relative to their employers (Oxfam South Africa, 2020). When comparing the division of labour amongst women domestic workers on the grounds of racial differences, it should be noted that of the large majority of female domestic workers in the country, 90% are African and 10% are Coloured (Oxfam South Africa, 2020).

These racial differences illustrate how women of colour, who are prevalent in other precarious forms of work as well, experience segmentation in the labour market into positions at the intersection of racial and gendered divisions of labour (See Bohrer, 2019). It is interesting to note, however, that with respect to variations in income across

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<sup>22</sup> For the purposes of this paper, precarious work is part of the informal sector, since they share defining features in terms of employment conditions, namely, no protection under labour legislation, no employment benefits, low wages and flexibility in working hours. See Oxfam South Africa (2020) and Francis, Valodia and Webster (2020)..

<sup>23</sup> This is in line with international trends which estimate that, globally, 80% of employed women work in precarious conditions. See Oxfam South Africa (2020).

racial groups, evidence shows that within each racial group in South Africa, men earned more than women (Statistics SA, 2013). Gender inequality appears to be a common denominator across various dimensions of intersecting inequalities.

#### 2.4 Gender inequality and its relation to the feminisation of care work

Thus far, it has been shown that, on average, women earn substantially less than men and have less access to social services and household assets. It has also been shown that women are more likely, on average, to experience poverty; to rely on debt to meet their consumption needs; and to work in low-wage precarious conditions. Why is this the case? In the discussion that follows, I argue that the feminisation of care work is a major contributing factor to these unequal gender outcomes.

Unpaid care work is both labour-intensive and time-consuming (Power, 2020). The feminisation of unpaid care work effectively means that, in comparison to men, women have less time and energy to partake in formal waged employment (Power, 2020). As shown in section 2.3.2, the labour-absorbing capacity of the economy is already severely constrained by its skewed industrial structure and the resulting high levels of structural unemployment. Thus, the feminisation of care work places an additional burden on women in the labour market: not only to find employment, but to find work which offers sufficient flexibility that accommodates the additional burden of care (Power, 2020). It is therefore plausible that women are more prevalent in flexible working conditions as a result of women's greater involvement in social reproduction that takes the form of care work.

The feminisation of care work is indeed evident in South Africa. Nationally represented data shows that women are more often the primary caregivers of children compared to men, illustrating that the provision of childcare is a highly gendered phenomenon (Hatch and Posel, 2018). A recent study showed that, on average, women spent 2.2 hours more per day than men on unpaid care work (Rubiano-Matulevich and Viollaz, 2019). Where a child under the age of 7 years lived in the home, this figure rose to approximately 3.3 hours per day (Rubiano-Matulevich and Viollaz, 2019). These outcomes are consistent with studies which estimate that only 3.3% of children live with only their fathers (Statistics SA, 2019). There is thus a clear sexual division of care labour in South Africa. This, I argue, reduces the amount of time and energy available to women who are primary caregivers to participate in the

formal labour market, which results in their increased participation, relative to men, in precarious work.

As more women than men are employed in precarious working conditions, this means that, in general, working conditions for women in South Africa are poorer than for men. This is because precarious workers do not receive any formal protection under labour legislation (Oxfam South Africa, 2020). Their employment can therefore be terminated easily and upon short notice (Oxfam South Africa, 2020). Furthermore, precarious workers' wages are low and employment benefits, such as health care and pension schemes, are seldom received (Oxfam South Africa, 2020).<sup>24</sup> Given that more women than men are employed in such conditions, the gender gap in expenditure and earnings across male- and female-headed households is not surprising.<sup>25</sup>

Furthermore, the lack of basic social services provided by the state means that care responsibilities are externalised onto women in particular, due to the gendered nature of unpaid care work in South Africa (Fraser, 2017). This makes unpaid care work for women more cumbersome, which limits their capacity to partake in formal employment even further (Himmelweit, 2017). The inability of women to partake in formal employment due to care responsibilities significantly reduces their earnings capacity, leading to the unequal economic and social outcomes between men and women observed above.

## 2.5 Concluding thoughts

There are a various dimensions of gender inequality in South Africa. These may be observed from the perspective of working-class conditions that have deteriorated in the post-apartheid era with the introduction of neoliberal-type policy reforms. Overall, the trends above show that women have been impacted more adversely than men across a range of factors that have contributed towards deteriorating working class conditions. It is argued that these unequal outcomes stem from women's greater involvement in social reproduction, since the feminisation of unpaid care work limits the conditions in which women can participate in the formal economy. As a result, many women are confined to low-waged, precarious working conditions with no labour

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<sup>24</sup> The lack of employment benefits is associated with the neoliberal-type policies which have led to a decline in social protection measures. See Mohamed, Ashman and Newman (2013).

<sup>25</sup> See Figure 2.

law protection and no social protection (in the form of pensions or medical aid).<sup>26</sup> The structural shifts under neoliberalism in the South African context have therefore had destabilising effects on social reproduction. This is because care work has been increasingly externalised onto families and in particular women (Himmelweit, 2017). At the same time, however, their capacity to perform this work has been diminished by deteriorating working class conditions (Fraser, 2017). In these circumstances, it has been argued that the feminisation of care work places an additional burden on women and acts a driver of gender inequality in South Africa. In Part Three, the implications of the COVID-19 pandemic and the government's fiscal response on women in South Africa are considered.

### Part Three: The impact of COVID-19 on gender inequality in South Africa and the Treasury's fiscal response from a feminist perspective

In the final part of this study, two recent developments which impact on gender inequality in South Africa are considered: the COVID-19 pandemic and the government's fiscal response to it. In order to illustrate how the pandemic has increased gender inequality, the economic consequences that it has had on both the paid and unpaid care sectors of the economy are discussed first. In particular, the impact of COVID-19 on health care workers, precarious workers, teachers and unpaid caregivers are looked at, since women are overrepresented in these sectors. Thereafter, the Treasury's response of implementing fiscal austerity is considered from a feminist perspective. Despite claims that austerity measures will revive the economy, it is shown below that this will not be the case and that women in particular will be disadvantaged by these fiscal policy interventions. It is argued that government should reject austerity on the basis that it will only exacerbate existing gender inequalities and that a human rights based approach is more appropriate given the state's constitutional obligations under the Bill of Rights.<sup>27</sup>

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<sup>26</sup> This is very different to previous phases of capitalism, particularly the welfare-state that developed after World War II and the Great Depression. Fraser (2017, p.30) argues that this phase of capitalism was the result from a class compromise which fuelled active investment by the state in areas of social reproduction, including health care, schooling, child care and pensions.

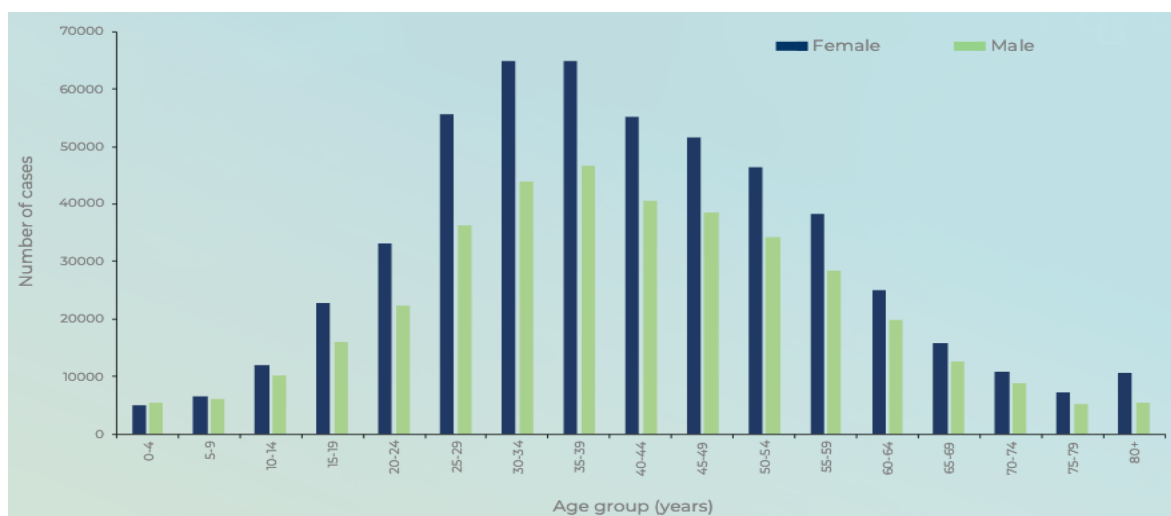
<sup>27</sup> In accordance section 27(2) of the Bill of Rights, the state is under an obligation to "take reasonable legislative and other measures, within its available resources, to achieve progressively the realisation

### 3.1 Economic outcomes of COVID-19 on women and gender inequality

#### 3.1.1 Health care workers

Approximately 70% of the health care workers globally are women (Boniol, et al., 2019). In the health care sector in South Africa, approximately 90% of nurses are women (South African Nursing Council, 2020). This is significant as nurses make up 77% of the labour force in the health care sector (South African Nursing Council, 2020). Community health workers also make up an important component of the public health care system in South Africa and also comprise mostly of women (Oxfam South Africa, 2020). As women make up a disproportionate amount of the frontline health care workers, women are at much greater risk than men in contracting COVID-19. Evidence shows that, overall, women have had a higher rate of infection than men (see Figure 8 below). This may be due to that fact that women are more represented in occupations in sectors which put them at a closer proximity to others, such as education and healthcare (National Institute for Communicable Diseases, 2020).

Figure 8: Number of confirmed COVID-19 cases by age and sex (December 2020)



(National Institute for Communicable Diseases, 2020)

#### 3.1.2 Precarious and informal (un)employment during COVID-19

Between March and June of 2020, 2.2 million South Africans lost their jobs (Statistics SA, 2020). Women accounted for two thirds of job losses, while men made

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of the socio-economic rights enshrined in section 27(1), which include access to health care and social security. See the Constitution of the Republic of South Africa, 1996.

up the remaining third (Casale and Posel, 2020). This suggests that the gender gap in the labour market has deepened since the onset of the pandemic. The retail and service sectors, such as those in hospitality, personal care, restaurants and domestic sectors of the economy are more saturated with women compared to men.<sup>28</sup> These sectors were hit particularly hard by the COVID-19 pandemic and its associated lockdowns, as they were not deemed “essential” and because the work that they comprise is labour-intensive and cannot be performed remotely (Alon, Doepke, Olmstead-Rumsey and Tertilt, 2020).

Furthermore, many domestic workers were unable to access social relief schemes, such as from the Unemployment Insurance Fund due to the large majority (approximately 80%) of domestic workers not being registered by their employers (Venter, 2020). The vulnerability of particularly Black women in South Africa has been exacerbated by the pandemic, as they are most likely to be employed in low-waged informal service sectors.<sup>29</sup> As sectors of the economy started to reopen, these women have also been more exposed to heightened risk of infection due to the social nature of their occupations which necessarily puts them in contact with people (Parry and Gordon, 2020).<sup>30</sup>

The position of Black women living in rural areas are faced with a range of intersecting inequalities that perhaps make them the most vulnerable group in the country, especially under the current circumstances. In rural areas, the majority of women work as subsistence farmers and informal traders (Parry and Gordon, 2020). The COVID-19 restrictions during the hard lockdown failed to include informal traders and women farmers in rural areas as “essential” providers, leaving them unable to harvest or sell their produce (Parry and Gordon, 2020). Indeed, in terms of job losses, Black women and women in the lowest earning bracket have suffered the most (Casale and Posel, 2020). Almost half of all women employed in the lowest earnings-bracket, compared to only 36% of men in the same category, lost their jobs during the lockdown (Casale and Posel, 2020). In comparison to employed men and women in the highest earnings-bracket, only 15% of women and 10% of men lost their jobs (Casale and Posel, 2020). Simply put, the vulnerabilities of the most vulnerable groups

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<sup>28</sup> See the discussion in Part Two section 2.3.4.

<sup>29</sup> See the discussion in Part Two section 2.3.4.

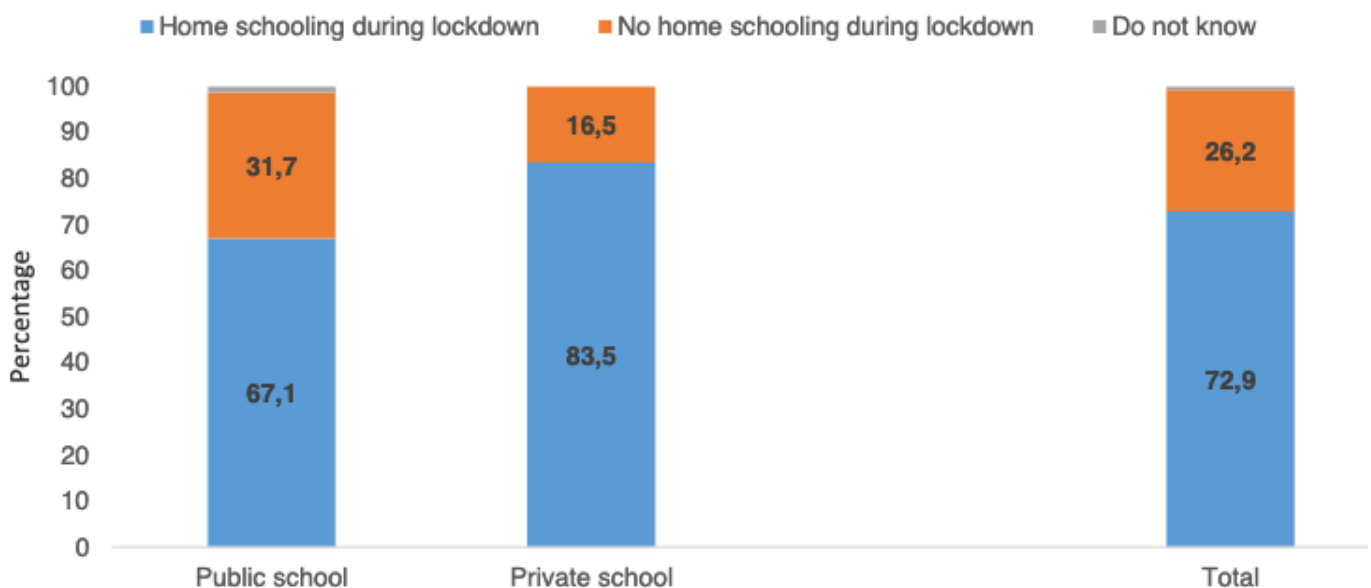
<sup>30</sup> See section 3.1.1.

in society have been exacerbated by the pandemic and the associated economic downturn, and these groups consist disproportionately of women.

### 3.1.3 Education during lockdown

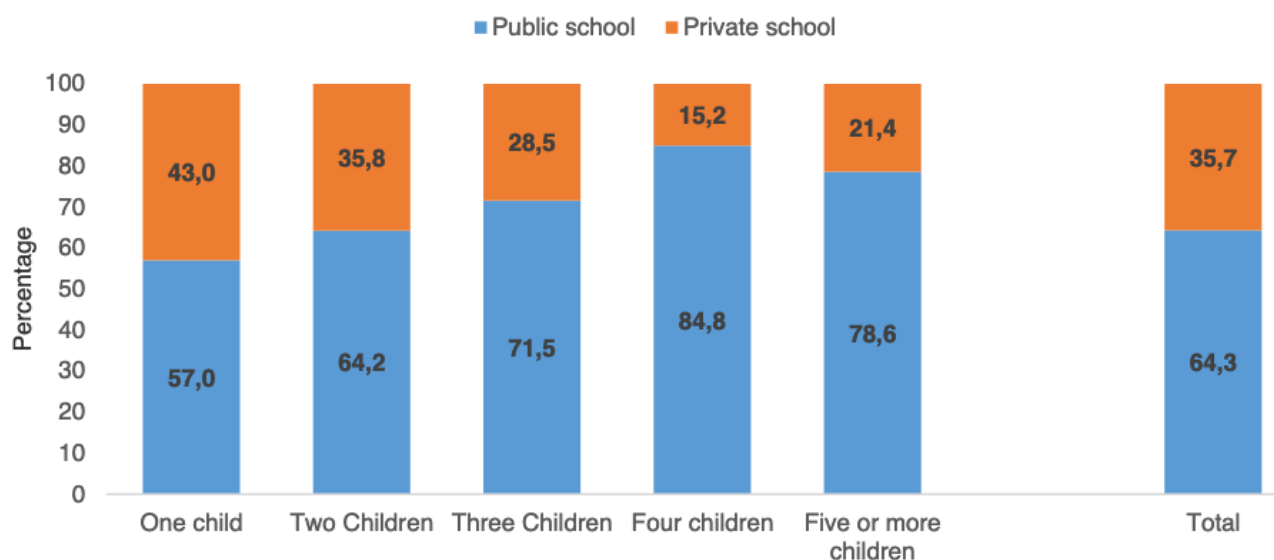
Before the onset of COVID-19, about 16 million children were enrolled either in school or an early childhood development centre (Casale and Shepherd, 2020). In an attempt to curb the spread of infection, schools and childcare facilities have been closed for the most part of 2020. Most households reported living with children who attended school prior to the onset of the pandemic (Statistics SA, 2020). The large majority of these children received home schooling while lockdown restrictions were in place (see Figure 9). This figure is noticeably larger for children attending private schools, despite a greater proportion (64%) of children in South Africa attending public schools (Statistics SA; see Figure 10 below).

*Figure 9: Percentage of households that did home schooling during lockdown by type of school (private or public)*



(Statistics SA, 2020)

Figure 10: Proportion of children attending public and private schools

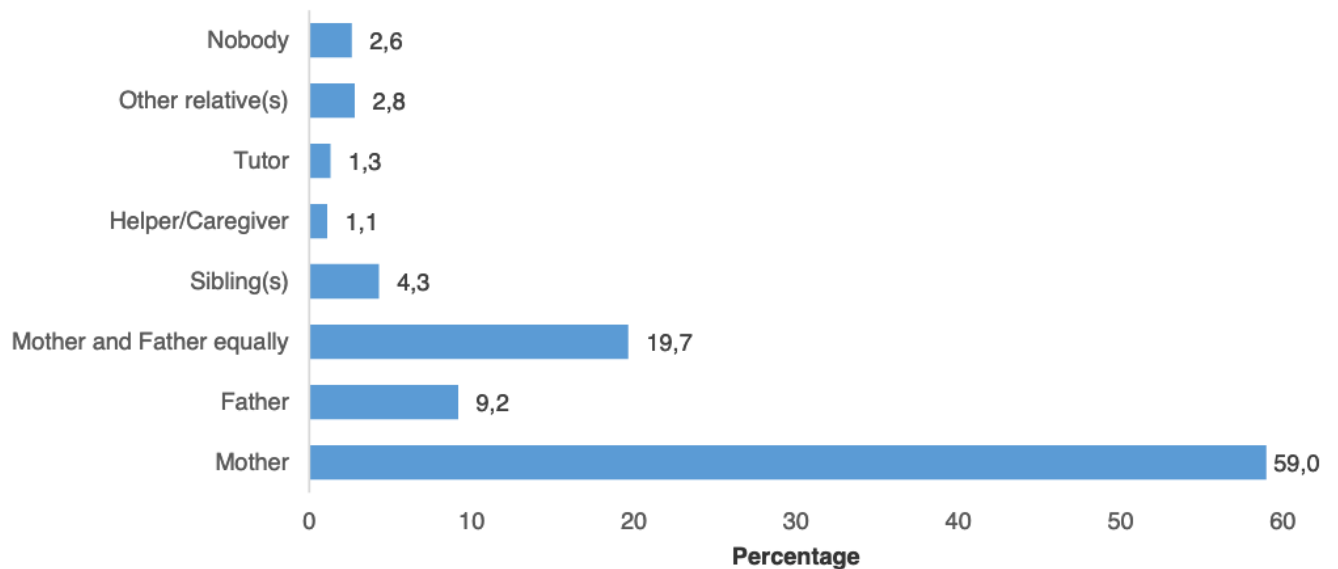


(Statistics SA, 2020)

### 3.1.4 The impact of COVID-19 unpaid caregivers

As most children who were enrolled at school prior to the pandemic received home schooling while lockdown was in place, the burden of care on women increased. During the first lockdown (level 5), 73% of women reported spending more time on childcare, compared to 66% of men (Casale and Posel, 2020). Data collected later in the year shows that mothers were the primary supervisors of learners while they home schooled (Casale and Shepherd, 2020, p.3). Thus, as a result of social norms that continue to place care responsibilities predominantly on women, women have had to spend far more time supporting children during lockdown compared to men.

Figure 11: Percentage of respondents by primary person supervising home schooling during lockdown



(Statistics South Africa, 2020)

Both men and women who did spend more time on childcare reported having spent over four extra hours per day, relative to pre-lockdown hours spent on childcare (Casale and Posel, 2020). This suggests that men might be more willing to assist with childcare involving schoolwork, perhaps as this is generally viewed as a less feminised form of care work (Casale and Posel, 2020). Overall, one could speculate that the additional time that men spent caring for children during the lockdown may be indicative of changing gender patterns, since men whose childcare burden increased may now be more aware of how burdensome childcare work is, and assume more responsibility for it. Nonetheless, the data clearly points to the fact that childcare is currently still highly gendered, illustrating that women receive insufficient support in care work from their male counterparts.

Furthermore, data suggests that women's involvement in childcare is insensitive to personal circumstances, such as employment status and level of education attained (Casale and Posel, 2020). This is significant to note, since during the hard lockdown domestic workers and childcare facilities were not available, meaning that women who earn enough to outsource care work were unable to do so. It could thus be argued that the insensitive nature of women's involvement in childcare, notwithstanding

differences in socio-economic status, may be illustrative of the tenacity of gender norms entrenched across all classes of South African society.

Due to the fact that many women in rural areas lack access to basic services, such as running water and electricity, the lockdown restrictions have been particularly cumbersome for them, as it has meant spending additional hours per day on care activities (Parry and Gordon, 2020). These include activities such as collecting water for increased sanitation requirements during the pandemic and wood for fuel purposes, which women are primarily responsible for in many rural communities (Parry and Gordon, 2020). In this manner, the COVID-19 pandemic has increased the unpaid care work burden for women living in rural areas.

### 3.2 The government's fiscal response to COVID-19 in areas of social reproduction

The previous section highlights the fact that the COVID-19 pandemic has had particularly negative economic and social consequences for women. Based on the gendered nature of these outcomes, it is not unfounded to draw the conclusion that the pandemic has increased gender inequality in South Africa. A gender-sensitive policy response by the state is therefore required if tackling gender inequality is indeed a priority (Oxfam International, 2021; Institute for Economic Justice, 2020; Casale and Shepherd, 2020). The government set aside an initial R500 billion 'stimulus package' for economic recovery following the downturn caused by the pandemic (Institute for Economic Justice, 2021). However, there are concerns regarding the government's fiscal response in the medium and long term.

One of the primary concerns that has sparked debate across economists, legal scholars, civil rights organisations and economic justice coalitions in South Africa, is the implementation of austerity measures which involve cuts in social expenditure (Sibeko and Isaacs, 2019; Heywood, 2021). Budget cuts in social spending directly affect women through their greater involvement in social reproduction, specifically in performing care work, and should thus be avoided if women's needs are to be prioritised (Griffin, 2015; UN Women, 2021). The National Treasury of South Africa stated at the end of October 2020 in its Medium-Term Budget Policy Speech that it plans to implement a 5 year plan for reducing the public debt burden (Mboweni, 2020). This has been reemphasised in the 2021/22 budget speech (Mboweni, 2021).

The overall objective of the state's fiscal response is two-fold: reduce the debt burden and increase economic growth (Mboweni, 2021). Instead of boosting economic growth by increasing government spending and thereby stimulating demand, the Treasury has cut corporate taxes in the hope that these gains will eventually "tick down" and create jobs in the economy (National Treasury, 2021; Heywood, 2021). This strategy is in accordance with the notion of market fundamentalism promoted under neoliberalism.<sup>31</sup> Proponents of austerity typically argue that debt beyond a certain threshold will retard economic growth, based on the findings by Reinhart and Rogoff (2010). However, these findings are not credible, since no clear causality between debt and economic growth has been established (Krugman, 2013). The government's austerity plan thus appears misguided. Indeed, there is plenty of evidence from across the globe on the costs of austerity, which include rising unemployment, lower wages and increased inequality (Sibeko and Isaacs, 2019, p.3).

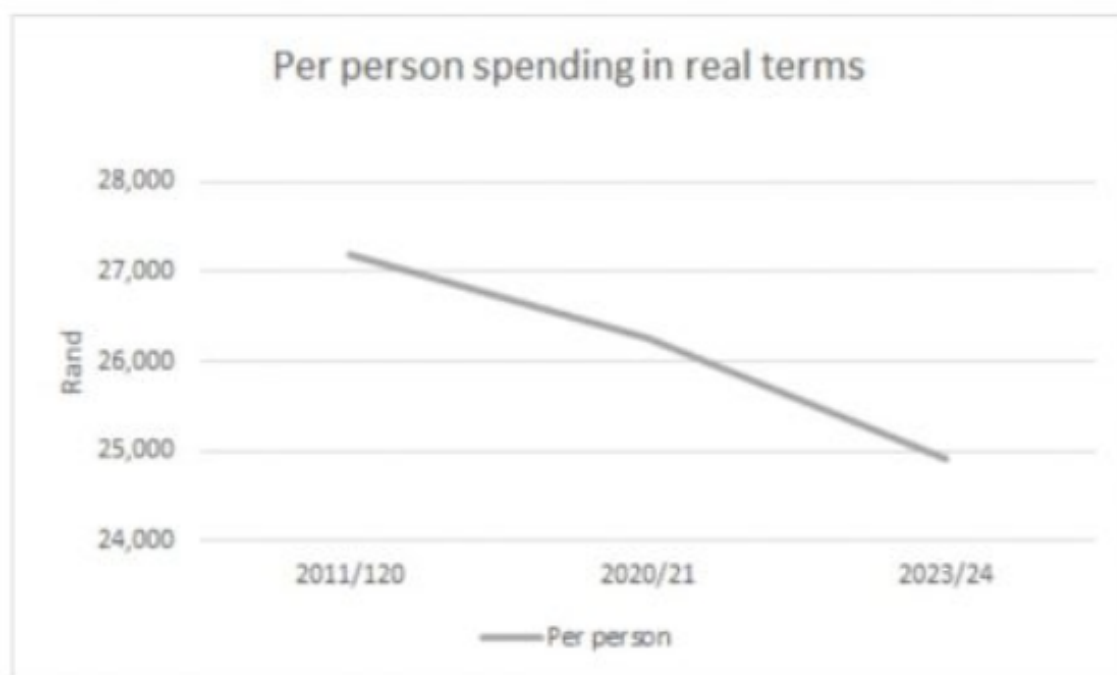
Given the high levels of unemployment and inequality already prevalent in South Africa, as well as widespread domestic and international opposition to austerity, the Treasury's fiscal plan is quite alarming (Eurodad, 2020; Sibeko and Isaacs, 2019; Institute for Economic Justice, 2021). Investment in social infrastructure and job creation are not being prioritised (National Treasury, 2021; Institute for Economic Justice, 2021).<sup>32</sup> The Treasury insists that the 2021 budget is "not an austerity budget" (Mboweni, 2021). However, this statement is misleading (Institute for Economic Justice, 2021). Figure 12 below shows that, in real terms, public expenditure per person has been in decline since 2011. Based on the government's 2021 budget plan, Figure 12 illustrates that this downward trend in per capita public expenditure is expected to continue over the next four years, which effectively amounts to austerity.

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<sup>31</sup> See Part Two.

<sup>32</sup> Professor Sandra Liebenberg, a distinguished socio-economic rights scholar in South Africa, criticised the Treasury's view that social spending in health care and education should be regarded as consumption spending, rather than investment spending. See Heywood (2021).

Figure 12: Per person expenditure cuts (2011-2024)



(Institute for Economic Justice, 2021)

### 3.3 Gendered implications of the Treasury's austerity measures

The evidence provided below shows that, in real terms, the government's investment in three key areas of social reproduction – namely education, health and social grants – has been cut. The gendered implications of these austerity measures will be discussed below in order to show how this will exacerbate gender inequality in South Africa.

#### 3.3.1 Public health

Aside from the government's COVID-19 funding, estimated at R22.9 billion in 2020, the health budget in its totality will be cut by a cumulative amount of R15 billion (or 12.5%) over the next three years (Section 27, 2021). This year, the government's total budget for health is cut by 2.2% (Section 27, 2021). As Figure 7 illustrates, already limited resources are stretched even further, these spending reductions threaten the sustainability of the public health care system upon which most South Africans rely. In addition, expenditure cuts will be at the expense of other health sector programmes that support HIV, TB and mental health, which is likely to increase the home-based

care of individuals living with these medical conditions (Akintola, 2008). At least two channels through which women are likely to be disproportionately impacted by these measures may be identified. Firstly, as women make up a large portion of the public health work force, they will disproportionately feel their real wages decline in the wake of health sector cuts and rising food prices.<sup>33</sup> Secondly, with limited resources, working conditions are expected to deteriorate, which, in conjunction with the previous point, is expected to increase the precarious nature of women's employment in the public health sector (Oxfam South Africa, 2020, p.9).

### 3.3.2 Public education

Taking into account inflation, government funding for education will decrease by approximately 7.4% over the medium term (Weinberg, Mtabane and Mtabane, 2021). This means that less money is allocated for teacher salaries – another sector of the labour market which disproportionately employs women. The Treasury has admitted that this is likely to affect learners negatively, since fewer teachers will result in bigger class sizes (National Treasury, 2021, p.59).<sup>34</sup>

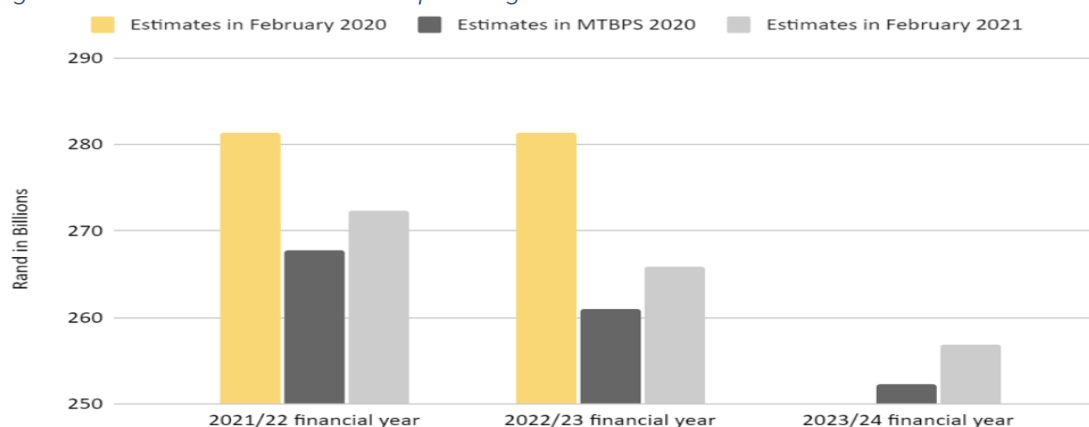
It is interesting to note that for the Department of Basic Education (DPE), while there are again cuts to teacher's salaries, additional funding has been made available this fiscal year for consultants (National Treasury, 2021). This effectively undermines the internal capacity of the state to progressively realise the right to basic education enshrined in the Constitution, while simultaneously expanding the profit-making opportunities of private parties (Equal Education, 2021). Between 2009 and 2018, government spending per learner on basic education decreased by 2.3% on average (Spaull, Lilenstein and Carel, 2020). Since the 2016/2017 fiscal year, spending on education as a percentage of total expenditure (excluding debt servicing costs) decreased from almost 19% to approximately 15% (Spaull, Lilenstein and Carel, 2020). Overall, the 2021 budget continues with the trend of underspending in basic education (Equal Education, 2021).

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<sup>33</sup> See section 3.1.1.

<sup>34</sup> See a critique of this in Jankie (2021).

Figure 13: Total basic education spending in real terms



(Equal Education, 2021)

The above fiscal policy decisions have adverse economic outcomes for women and children on the following bases. Firstly, as women make up a large amount of teachers relative to men, they will again feel the effects of increased unemployment and salary cuts in education more than men (Trading Economics, 2021).<sup>35</sup> Secondly, lack of infrastructure spending in public schools will deteriorate the quality of education received. Thirdly, budget cuts particularly in basic education may limit an already insufficient provisioning of meals for children through the public schooling system – this not only has long-term consequences for early childhood development but also places an additional burden on mothers who are primary caregivers to supplement these meals themselves (Chaskalson, 2021).

### 3.3.3 Social grants

Of the R500 billion COVID-19 relief package, only R50 billion is allocated to social grant spending to support vulnerable households. This is despite at least 30 million South Africans – the majority of the population – living below the poverty line with an income of approximately, or less than, R40 per day (World Bank, 2020). The amount of fiscal space afforded to social grants will decrease by R5.8 billion in 2021/22, R10.7 billion in 2022/23 and R19.5 billion in 2023/24 (SA News, 2021). This year, the Child Support grant has increased by R10, from R450 to R460 (National Treasury, 2021). However, as inflation is forecasted at 4.2% to 4.4% per year, in real terms the Child Support grant has decreased (Heywood, 2021). This will place 7.1 million caregivers

<sup>35</sup> According to World Bank data for the year 2015, 78% of primary education teachers were women.

– of which 98% are women – and about 13 million children in an even worse position economically than before, which is significant taking into consideration that these grants go to the poorest members of society (Budget Justice Coalition, 2021).

The real reduction in the Child Care grant has detrimental consequences for women in South Africa. This grant is specifically aimed at supporting one aspect of the care work involved in social reproduction, namely, raising and looking after children. Given that child care is highly feminised in South Africa, a change in the value of the Child Care grant impacts women more than it does men. A real reduction of this grant directly limits the capacity of women to undertake care work and therefore has a destabilising effect on the processes of social reproduction. This is indicative of a gender bias in the government's expenditure plans.

### 3.4 Concluding thoughts

The outcomes above, which undoubtedly exacerbate already high levels of gender inequality in South Africa, are consistent with findings elsewhere which highlight that austerity policies push more women into informal and vulnerable work relative to men (Griffin, 2015). It is also consistent with the notion that austerity places the responsibility of social reproduction onto households, and effectively onto women (Griffin, 2015). This undermines progress towards a more equal division of care responsibilities, thereby reinforcing gender norms surrounding care work. Austerity – particularly in areas of health care, education and social grant spending – also undermines the government's responsibility under the Constitution to progressively realise socio-economic rights (Heywood, 2021).

The government should reject austerity as a policy response to the public debt burden as a means to stimulate investment and economic growth. Austerity is not a gender-neutral policy and will in fact only exacerbate gender inequality by increasing unemployment and increasing care responsibilities that hinder women's participation in the formal economy. Rather, investment in social infrastructure is necessary. In this regard, increased investment in social reproduction which is targeted at providing basic health care, basic education and adequate social grants to poor and low-income households will not only provide direct support to women in their capacity as primary caregivers, but is fundamentally consistent with the state's constitutional obligation under Bill of Rights. In my view, it would be appropriate for the fiscal policy decisions

of the state to be subjected to a human rights impact assessment prior to implementation (Corkery and Isaacs, 2020).

## Conclusion

This study employed a Marxist-feminist approach in order to place care work within the system of capitalism and to illuminate its highly gendered and exploitative character. Care work encompasses the process of social reproduction, which is a condition of possibility for capital accumulation. Yet, capitalism's contradictory nature undermines social reproduction. As a result, care work becomes a means by which capitalism exploits women due to its feminised character. Since the 1990s, the conditions of capital accumulation have restructured the South African economy such that the conditions of the working class have deteriorated in the neoliberal age. Women have felt the effects of this more intensely than men, as a result of persistent patriarchal norms that allocate a greater responsibility of care work unto women. As such, women are more likely to be unemployed, and if they are employed, more likely to work in precarious working conditions, characterised by low wages and no job security. The individualisation of care work, combined with the expansion of household debt, are pushing female-headed households into positions of greater economic insecurity in South Africa. The higher incidence of unemployment and poverty among female-headed households reinforces this finding. Given the nuanced character of inequality in South Africa, an intersectional lens was employed to illustrate how rural, Black women are particularly disadvantaged in this country.

The COVID-19 pandemic and the government's associated lockdown policies have exacerbated gender inequality in South Africa. This is largely due to the sexual division of labour which still confines a disproportionate amount of women to care sectors of the economy – both paid and unpaid – which have been hit particularly hard by the pandemic. The government's fiscal response in implementing austerity policies, specifically in health, education and social grant spending, is unfortunate for the following reasons. Austerity increases the burden of care for women – since women still perform this work to a far greater extent compared to men – by individualising care responsibilities and shifting these onto households. Poorer female-headed

households are especially impacted by this due to the higher incidence of these households being dependent on social grants, public education and public health care.

Since the sexual division of labour still confines women to care work not only in the unpaid sector but also in paid sectors of the economy, budget cuts to education and health care will increase unemployment rates for women more so than for men. As such, evidence suggests that austerity will exacerbate gender inequality in South Africa. Therefore, the government's fiscal priorities are not gender neutral. The detrimental consequences that the state's austerity measures will have on women indicate that women's work, paid and unpaid, are highly undervalued in South Africa. In this manner, austerity reinforces inequitable gender stereotypes and entrenches the exploitation of women's labour under capitalism. On this basis, austerity should be refused. A human rights based approach is more appropriately aligned with the state's constitutional obligations under the Bill of Rights. (Word count: 12312)

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