

Pathways to Gender-Inclusive Economic Development in Sub-Saharan Africa: A Sectoral Analysis

South Africa Report



© 2023 Euromonitor International

Euromonitor International and Kore Global (2023) Pathways to Gender-Inclusive Economic Development in Sub-Saharan Africa: A Sectoral Analysis (2023)

Euromonitor International would like to thank Kore Global, for partnering with us in the writing and finalisation of this report.



This report is a product of Euromonitor International with staff and external contributions. Euromonitor International neither guarantees the accuracy of the data and findings included in this report, nor the precision of interpretations and conclusions drawn from it by users. The terms and language utilised in this report as well as any geographic descriptions/boundaries shown on any map or content in this report do not imply any judgment, acceptance, or endorsement of the identity of any persons/groups or the legal status of any territories on the part of Euromonitor International.

This report does not necessarily reflect the views of the Mastercard Foundation, UN Women, International Development Research Centre, UN Economic Commission for Africa (UN ECA), Euromonitor International, U.S. Overseas Cooperative Development Council (OCDC), the United States Agency for International Development, or the United States Government.

Images courtesy of USAID / Getty Images.

Reading note: The general and sectoral barriers to and drivers of women's economic empowerment opportunities reported on in the Pathways Study are more similar than different. For the purpose of sectoral-level stakeholders, this report provides a full discussion of these barriers and drivers per sector. While this inevitably results in some repetition across the report, the intention is for each sectoral brief to stand as an independent piece/extract if necessary.

The Pathways to Gender-Inclusive Economic Development in Sub-Saharan Africa: A Sectoral Analysis (Pathways Study) is a collaborative effort among various stakeholders (organisations, individual researchers and gender experts) who joined forces and expertise to achieve a common goal - developing and implementing strategies to strengthen women's economic empowerment in South Africa.

These include:

- The Pathways Study Steering Committee (SC) which provided financial and/or technical support for the Pathways project including: (i) International Cooperative Research Group (ICRG), which is the research arm of the United States Overseas Cooperative Development Council (U.S. ODCD); (ii) United States Agency for International Development (USAID); (iii) Mastercard Foundation; (iv) International Development Research Centre (IDRC); (v) United Nations Entity for Gender Equality and the Empowerment of Women (UN Women); (vi) the African Trade Policy Centre (ATPC) which is a specialised unit within the United Nations Economic Commission for Africa (UN ECA); and (vii) Euromonitor International Ltd. SC partners also provided directional guidance in the making of key decisions, supported by making referrals and connections with key country stakeholders, and reviewed draft reports.
- Kore Global, a women-led gender equality and social inclusion consulting firm that supported with the finalisation of the country reports. The team included women's economic empowerment experts Rebecca Calder, Jenny Holden, and Federica Busiello that co-wrote the final report.
- Country Working Group members including: Dave Romero (Caban Investments), Lesley Ann Foster (Masimanyane Women's Support Centre), Nonhlanhla Khoza (Izandla Property), Tim Scholtz (KTMC Management Services Pty Ltd), Yolanda Petersen (Women Lead Movement), Vuyiswa Mutshekwane Ramokgopa (National Property Practitioners Council - NPPC).
- Experts (Gender and Thematic) who reviewed and/or contributed to the report: Andria Hayes-Birchler, Dr John Rukundo, Enock Mugabi and Harriet Odembi Gayi.

We would also like to thank the research participants who engaged with us throughout this study. This work would not be possible without the support of those who took the time to share their professional and sometimes personal experiences. While our work can never do justice to the multitude of voices of women (and men) working on gender equality, we hope that this report stays true to the spirit of your responses.

We are keen for the findings of the Pathways study to guide research, policy development and implementation, programming (planning and execution) and advocacy efforts - creating unified voice, clear(er) direction and sustainable action for improved women's economic empowerment in South Africa.

Pathways Study Steering Committee

Acknowledgments	3	4. Barriers and enablers to women's economic empowerment in South Africa	46
Table of contents	4	4.1 Structural factors	47
List of acronyms and abbreviations	6	4.1.1 Legal and policy commitments	47
Table of definitions	8	4.1.2 Policy environment	48
Executive summary	12	4.1.3 Selected non-governmental stakeholders supporting women	51
Introduction	12	4.2 Normative factors	51
Key findings - sectoral Analysis	14	4.2.1 Norms around paid and unpaid labour	51
Structural factors	14	4.2.2 Voice, representation and leadership in decision making	52
Normative factors	15	4.2.3 Gender-based violence (GBV)	53
Individual factors	16	4.3 Individual factors	54
Implications and recommendations	17	4.3.3 Economic capital	55
1. Introduction	20	5. Sector analysis briefs	58
Background and objectives	20	5.1 The manufacturing sector (clothing, textiles, footwear and leather (CTFL))	59
Methodology summary	22	Sector overview	59
2. Conceptual framework for understanding women's economic empowerment (WEE)	24	Role of women in the clothing, textiles, footwear and leather value chain	63
Structural factors	26	Summary of barriers to and opportunities for women's economic empowerment in the clothing, textiles, footwear and leather sector value chain	64
Normative factors	26	Structural factors	66
Individual capital factors	27	Normative factors	67
3. Country context for women's economic empowerment	30	Individual factors	68
3.1 Demographics and geography	30	Recommendations	70
3.2 Human development	34		
3.3 Status of the economy, labour force participation and employment	39		
3.4 Structure and functions of government	44		

5.2 Real estate sector (development/ construction and property management/ agency services)	73	6. Implications and recommendations	100
Sector overview	73	6.1 Policy/Advocacy recommendations	101
Development/Construction	73	6.2 Programming recommendations	104
Property management/ Agency services	74	6.3 Research, monitoring and evaluation recommendations	108
Role of women	75	Appendices	110
Development/Construction	75	Appendix 1 - Explanation of methodology	110
Property management/ Agency services	76	Scoping study	110
Summary of barriers to and opportunities for women's economic empowerment in the real estate sector value chain	78	Sector selection	112
Structural factors	80	Stakeholder mapping	115
Development/Construction	80	Interviews	116
Property management/ Agency services	81	Analysis and reporting	116
Normative factors	81	Appendix 2 - Sector classification	117
Development/Construction	81	Appendix 3 - Cross-sectoral summary of barriers and opportunities and entry points	121
Property management/ Agency services	82	Bibliography	123
Individual factors	83	Limitations of Research	140
Development/Construction	84		
Recommendations	86		
5.3 Wholesale and retail trade (WRT)			
Sector overview	88		
Role of women	91		
Summary of barriers to and opportunities for women's economic empowerment in the wholesales and retail trade value chain	92		
Structural factors	93		
Normative factors	94		
Individual factors	95		

AfDB	African Development Bank	FET	Further Education and Training
ANC	African National Congress	FLFP	Female Labour Force Participation
ART	Antiretroviral Therapy	FP&M SETA	Fibre Processing & Manufacturing Sector Education and Training Authority
ATPC	African Trade Policy Centre	FRA	Fuel Retailers Association
BBBEE	Broad-Based Black Economic Empowerment	GBV	Gender-Based Violence
BCEA	Basic Conditions of Employment Act	GBVF	Gender-Based Violence and Femicide
BUSA	Business Unity South Africa	GBVH	Gender-Based Violence and Harassment
CAGR	Compound Annual Growth Rate	GDP	Gross Domestic Product
CCC	Clean Clothes Campaign	GRB	Gender-Responsive Budgeting
CCTC	Cape Clothing and Textile Cluster	GRPBMEAF	Gender-Responsive Planning, Budgeting, Monitoring, Evaluation and Auditing Framework
CDI	Craft and Design Institute	IMF	International Monetary Fund
CEDAW	Convention on the Elimination of All Forms of Discrimination Against Women	GVA	Gross Value Added
CESM	Classification of Education Study Material	HDI	Human Development Index
CGCSA	Consumer Goods Council of South Africa	HET	Higher Education and Training
CIDB	Construction Industry Development Board	HIV	Human Immunodeficiency Virus
CMT	Cut, Make & Trim	HSDG	Human Settlement Development Grant
COID	Compensation for Occupational Injuries and Diseases	ICA	International Cooperative Alliance
COSATU	Congress of South African Trade Unions	ICRG	International Cooperative Research Group
CSO	Civil Society Organisations	ICT	Information Communication Technology
CTCP	Clothing & Textiles Competitiveness Programme	IDP	Internally Displaced People
CTFL	Clothing, Textiles, Footwear and Leather	IDRC	International Development Research Centre
DHS	Demographic and Health Survey	ILO	International Labour Organization
EEA	Employment Equity Act	IMF	International Monetary Fund
EFF	Economic Freedom Fighter	IPV	Intimate Partner Violence
EMI	Euromonitor International	IT	Information Technology
EPWP	Expanded Public Works Programme	LED	Local Economic Development
ESD	Enterprise Supplier Development	LRA	Labour Relations Act
FDI	Foreign Direct Investment	MMFR	Maternal Mortality Facility Ratio

MSME	Micro Small and Medium Enterprises	SRHR	Sexual Reproductive and Health Rights
NCI	National Construction Incubator	SSA	Sub-Saharan Africa
NCRF	Clothing Retail Federation of South Africa	SS-CF	Stepping Stones and Creating Futures
NDP	National Development Plan	SSETA	Services Sector Education and Training Authority
NEDLAC	National Economic Development and Labour Council	STEM	Science, Technology, Engineering & Mathematics
NSDP	National Skills Development Plan	TEXFED	Textile Federation
PSA	Proudly South African	TFG	The Foschini Group
QR	Quick Response	TLG	Traditional Leadership and Governance
RA	Retailers Association	TOP	Termination of Pregnancy
RCT	Randomised Controlled Trial	TWIB	Technology for Women in Business
R-CTFL	Retail Clothing, Textiles, Footwear and Leather	UIF	Unemployment Insurance Fund
REIT	Real Estate Investment Trust	USAID	United States Agency for International Development
RMI	Retail Motor Industry Association	VAWG	Violence Against Women and Girls
SACTWU	Southern African Clothing and Textile Workers Union	VCA	Value Chain Alignment
SACU	Southern African Customs Union	VPUU	Violence Prevention through Urban Upgrading
SADC	Southern African Development Community	VSLA	Village Savings and Loan Associations
SAGC	South African Geometrics Council	W&R SETA	Wholesale and Retail Sector Education and Training Authority
SAWIC	South African Women in Construction	WASH	Water, Sanitation and Hygiene
SEDA	Small Enterprise Development Agency	WECP	Women Enterprise Coaching Program
SEZ	Special Economic Zone	WEE	Women's Economic Empowerment
SGBV	Sexual and Gender-Based Violence	WEGE	Women Empowerment and Gender Equality
SME	Small and Medium-Sized Enterprises	WOBS	Women-Owned Businesses
SMME	Small, Medium and Micro Enterprises	WPN	Women's Property Network
SRGBV	School-Related Gender-Based Violence	WRT	Wholesale & Retail Trade
SRH	Sexual and Reproductive Health	WVE	Women's Vulnerable Employment

Key term	Definition
Cooperative	<p>A cooperative is an autonomous association of persons united voluntarily to meet their common economic, social and cultural needs and aspirations through a jointly-owned and democratically-controlled enterprise.</p> <p>Source: International Cooperative Alliance (ICA)</p>
Economic violence	<p>Economic violence is a form of gender-based violence, and can include acts perpetrated by systems and structures, as well as by individuals. It involves behaviours that control a woman's ability to acquire, use and maintain economic resources, thus threatening her economic security and potential for self-sufficiency.</p> <p>Source: Adams et al, 2008</p>
Employment segregation	<p>The unequal distribution of female and male workers across and within job types.</p> <p>Source: World Bank</p>
Financial exclusion	<p>Financial exclusion refers to a process whereby people encounter difficulties accessing and/or using financial services and products in the mainstream market that are appropriate to their needs and enable them to lead a normal social life in the society in which they belong.</p> <p>Source: European Commission, 2008</p>
Gender-based violence (GBV)	<p>Harmful acts directed at an individual or a group of individuals based on their gender. It is rooted in gender inequality, the abuse of power and harmful norms.</p> <p>Source: UN Women</p>
Gender norms	<p>Accepted attributes and characteristics of male and female gendered identity at a particular point in time for a specific society or community. They are the standards and expectations to which gender identity generally conforms, within a range that defines a particular society, culture and community at that point in time. Gender norms are ideas about how men and women should be and act. Internalised early in life, gender norms can establish a life cycle of gender socialisation and stereotyping.</p> <p>Source: UNICEF</p>
Gender wage gap	<p>The gender wage gap is defined as the difference between median earnings of men and women relative to median earnings of men.</p> <p>Source: OECD</p>

Key term	Definition
Own account workers	<p>Own account workers are those workers who, working on their own account or with one or more partners, hold the type of job defined as a self-employed job, and have not engaged on a continuous basis any employees to work for them during the reference period.</p> <p>Source: OECD</p>
Productive employment	<p>Productive employment is defined as employment yielding sufficient returns to labour to permit the worker and her/his dependents a level of consumption above the poverty line.</p> <p>Source: ILO</p>
Resilience	<p>The capacity of individuals, communities, institutions and systems to survive, cope and thrive in the face of shocks and stresses.</p> <p>Source: Mastercard Foundation</p>
Sector and Sub-Sector	<p>The Pathways study uses ‘sector’ to refer to a broad area of economic activity - an umbrella category that has other economic activities within it. A sector could entail any or all of the following economic activities: (i) primary activities (i.e., related to extraction of raw materials), (ii) secondary activities (e.g., manufacturing-related) or (iii) tertiary activities (i.e., related to services). Sub-sector is generally used to denote specific economic activities within a broad sector. While this may appear inconsistent, both terms are sometimes used interchangeably as sub-sectors are not purely divisions or components of a sector; sub-sectors can vary enough to be discussed and/or analysed independently, and a sub-sector in one report may be a sector in another. As our sectors and sub-sectors of focus were selected through consultations with local working groups in each country, we opted to stay as true to the language utilised by these working groups as possible. As such, our use of the word “sector” and “sub-sector,” and the terminology for each sector depends on the country context. For instance, while ‘agriculture’ is a broad economic sector, specific sectors/sub-sectors within it include commodities such as rice, cocoa, or maize, or commodity groups such as horticulture. In other cases, sector names have been adapted to use those referenced by our working groups. In Ghana, for example, we speak of “textiles”, while in South Africa we speak of “Clothing, textiles, footwear, and leather” (CTFL).</p>

Key term	Definition
Social capital (vertical and horizontal)	<p>Social capital refers to the institutions, relationships and norms that shape the quality and quantity of an individual and society’s social interactions. It includes both vertical and horizontal¹ associations between people, and includes behaviour within and among organisations, such as firms.</p> <p>This view recognises that horizontal ties are needed to give communities a sense of identity and common purpose, but also stresses that without “bridging” ties that transcend various social divides (e.g. religion, ethnicity, socioeconomic status), horizontal ties can become a basis for the pursuit of narrow interests, and can actively preclude access to information and material resources that would otherwise be of great assistance to the community (e.g. tips about job vacancies, access to credit).</p> <p>Source: World Bank</p> <p>Cooperatives have a social network that combines both horizontal and vertical social ties. Horizontal ties represent the social relationships and interactions between cooperative members while vertical ties are the social connections between cooperative members and parties such as off-takers, processors/buyers etc.</p> <p>Source: Deng et al (2020)</p>
Unpaid care and domestic work	<p>Refers to care of persons and housework performed within households without pay, and unpaid community work.</p> <p>Source: OECD</p>

¹ Vertical social capital refers to interactions with people/organisations of different (higher) socioeconomic standing (i.e. access to resources), while horizontal social capital refers to connections and relations between people/organisations of similar socioeconomic standing and with access to similar resources.

Key term	Definition
Violence against women and girls (VAWG)	<p>Violence against women and girls is any act of gender-based violence that results in, or is likely to result in, physical, sexual or mental harm or suffering to women and girls, including threats of such acts, coercion or arbitrary deprivation of liberty, whether occurring in public or in private life. Violence against women and girls encompasses, but is not limited to, physical, sexual and psychological violence occurring in the family or within the general community.</p> <p>Source: UN Women</p>
Women's economic empowerment (WEE)	<p>Women having the ability to succeed and advance economically, and the power to make and act on economic decisions to enhance their broader wellbeing and position in society.</p> <p>Source: Calder et al., (2020)</p>
Women's vulnerable employment (WVE)	<p>Women's vulnerable employment is contributing female family workers and own-account workers as a percentage of total employment. It is derived using data from the International Labour Organization, ILOSTAT database.</p> <p>Source: World Bank</p>

Executive summary

South Africa has made significant progress on gender equality in recent years including in educational access, health outcomes and political representation. With a female labour force participation (FLFP) rate of over 51%, women's engagement in the formal South African economy is much higher than its Sub-Saharan African (SSA) neighbours. Average fertility rates remain lower than the SSA average at 2.4 births per woman, and almost half of women of reproductive age are using some method of contraception. South Africa ranks 69 on the educational attainment Global Gender Gap Index 2021 and has closed 99% of its gender gap in education.²

² World Economic Forum (2021)

Despite this progress in many gender-related outcomes, women are more likely to be unemployed, in lower-paid and lower-skilled jobs, and/or work in the informal sector than men. Gendered labour market differences compounded by women's significant unpaid care responsibilities leads to a significant wage gap (between 23% and 35%), between men and women despite the introduction of a national minimum wage of ZAR23.19 effective 1 March 2022.³ Women continue to face significant gender-related barriers to establishing and succeeding in businesses, and ownership remains largely male dominated, with almost four out of five businesses owned by a man.

Women in South Africa are more likely to live in poverty than men, and Black African women continue to experience significant discrimination in the labour market.

Female-headed households are particularly vulnerable; on average 40% poorer than male-headed households. Black African women have the lowest rates of formal employment and the lowest level of earnings,⁴ and suffer “triple marginalisation” precipitated by race, sexism and social class.⁵

The COVID-19 pandemic has further exacerbated existing gender inequalities in the labour market, with two thirds of job losses as a result of the pandemic experienced by women. As the country

emerges from the economic and social impacts of the COVID-19 pandemic, investing in sustainable and inclusive solutions to women's economic empowerment will be key to the nation's economic recovery.

This report presents an overview of women's economic empowerment in South Africa. Drawing on economic modelling, desk-based research, interviews⁶ and expert reviews, the report explores available data and evidence on factors influencing women's economic empowerment in the South African context. The report applies a holistic conceptual framework for women's economic empowerment that identifies multiple and overlapping factors at three different levels, which combine and interact to influence women's economic empowerment:

- **Structural factors:** Including the policy and programming environment.
- **Normative factors:** Including social and gender-based norms which shape women's engagement in paid and unpaid work, as well as factors such as violence against women and girls (VAWG) which hinder active women's economic participation, rights and wellbeing.
- **Individual factors:** Including human, social and economic capital.

³ LWO (2022) ⁴ International Finance Corporation (2006) ⁵ Akala, B. (2018) ⁶ 32 interviews were conducted with various stakeholders including professional groups and industry associations, NGOs, government bodies/agencies, private companies and academia. Please refer to Appendix 1 for a detailed explanation of the methodology including the summary of stakeholders interviewed.

The report identifies key factors at each of these levels with relevance to all sectors. In addition, the report presents specific findings related to three broad sectors selected in consultation with country-level stakeholders: (i) the manufacturing sector (clothing, textiles, footwear and leather (CTFL)); (ii) the real estate sector (development/construction and property management/agency services); and (iii) the wholesale and retail trade (WRT) sector.

Part of a series of reports commissioned on Sub-Saharan Africa (SSA), the report aims to provide practical recommendations for public and private sector partners to consider what would improve and expand women's economic opportunities and contribute meaningfully to women's economic empowerment.

Key findings – Sectoral analysis

The sectoral analysis identified key trends related to women's roles and engagement in the manufacturing (clothing, textiles, footwear and leather (CTFL), real estate (development/construction and property management/agency services), and wholesale and retail trade (WRT) sectors.

In each of these sectors, women face barriers to economic empowerment. At the same time, the report identifies opportunities and

entry points for the sectors to strengthen women's economic empowerment and their broader wellbeing.

Highlights are summarised below with a detailed explanation of the cross-cutting/contextual structural, normative and individual factors in section 4 and deeper sector-specific analysis of these factors provided in section 5 of the report. Appendix 3 offers a cross-sectoral table summary of the barriers and opportunities and entry points.

Structural factors

The policy environment in South Africa is broadly supportive of women's economic empowerment, with constitutional, legislative and legal mandates associated with advanced socioeconomic gender empowerment articulated in the multi-sector 2015-2020 Strategic Plan and National Gender Policy Framework for Women's Empowerment and Gender Equality (2016). The National Development Plan (NDP) 2030 includes a focus on expanding public employment to provide jobs for unemployed women and youth, while tackling women's unpaid care burden.⁷ The government has also initiated a number of programmes aimed at women's economic empowerment in South Africa, coupled with initiatives targeting youth unemployment. However, while there are gender equality targets included in national development plans and

⁷ South Africa & National Planning Commission. (2012)

supportive policies and programmes, this has not yet translated into creation of permanent and secure employment opportunities.

South Africa performs well on laws for women's empowerment and gender equality. Labour laws include provisions on gender-based violence and harassment (GBVH) in the workplace, equality in employment rights, maternity leave and prohibition of dismissal of pregnant employees. Laws also mandate equality in access to credit and equal inheritance rights.

However, legal protection for South Africa's informal workers - where a significant proportion of women are situated, is more limited. For example, there is a lack of legal and regulatory frameworks supporting the rights of informal domestic workers. Furthermore, as the sectoral briefs highlight, significant implementation gaps exist between policies and practices in many sectors. As a result, women workers in many sectors experience poor working conditions and health and safety risks.

The South African government has a substantial social safety net programme, with the South African Social Security Agency (SASSA) providing income support to almost 11.5 million vulnerable individuals and households throughout the country with social assistance as at 2020/2021.⁸

This includes a COVID-19 social relief of distress grant of ZAR350 per month to support poor households during the pandemic, recently extended in 2022 to cover an additional 12 months.⁹

Normative factors

Women in South Africa are still disproportionately burdened with unpaid care work relative to men.¹⁰ While men spend most of their productive time on market work, women spend 71% of their productive time on household production at every age.¹¹ The disproportionate burden of unpaid care work for women is particularly prohibitive for entry into the formal sector, where working hours are less flexible.¹² Women's relative time poverty was further exacerbated during the COVID-19 pandemic.

Gender norms continue to influence the type of roles deemed appropriate for women. Gender norms and stereotypes also restrict women from taking on senior leadership roles in many sectors from academia to corporate leadership. Barriers for women include entrenched traditional attitudes to women in the workplace, gender-discriminatory workplace cultures, and lack of provisions or allowances for women's family and social roles (such as flexible working or sufficient childcare provisions).¹³

⁸ Parliament Budgetary Office (2021) ⁹ SA News : South African Government News Agency (2022) ¹⁰ Smith, C. (2019)
¹¹ Smith, C. (2019) ¹² Smith, C. (2019) ¹³ Mwangi, N. (2020)

Women are increasingly represented in politics, although social factors continue to limit their decision-making power at home and in the workplace. Women are well represented in South African politics, despite the lack of legislated quotas for the Upper and Lower Houses of Parliament. South Africa has also adopted legislative measures to promote gender-inclusive local government elections. However, limited policy support, mentoring, peer networking and inflexible work arrangements hinder women leaders' participation, contributions and influence.¹⁴ Furthermore, at the household level, men continue to dominate decisions around employment income and opportunities.¹⁵

Violence against women and girls (VAWG) constrains women's outcomes and is intrinsically linked to women's employment and earning potential, along with access to resources. Women are at risk of experiencing violence at home as well as in the workplace, driven by deep-seated patriarchal norms and attitudes. Gender-based violence continues to curtail mobility by impacting women's ability to travel safely, particularly when dependent on public transport. Female migrants are especially vulnerable, given their engagement in informal cross-border trade and their undocumented status.¹⁶ However, interventions targeting harmful masculinities show promise in their potential to prevent gender-based violence.¹⁷

Individual factors

Women's labour market opportunities are limited by their level of education and skills. For example, women dominate in the clothing, textiles, footwear and leather (CTFL) sub-sector of the manufacturing sector which has low skills and education requirements for entry level positions; while the property management sub-sector, where women are less represented, often requires tertiary education. Similarly, women are often either directly or indirectly excluded from professional networks.

Limited access to capital or credit constrains women's ability to invest in, start, or expand their businesses.

Despite the introduction of a broad-based Black Economic Empowerment Act, Black African women continue to experience discrimination in business.

Gender inequalities in access to land, digital inclusion and reliance on natural resources further impede women's economic potential, especially in rural areas. While the country has introduced positive legislation around women's equal land rights, a combination of customary and patriarchal norms continue to favour male ownership. Infrastructure developments such as rural electrification have had a positive impact on women's unpaid work burden by reducing the time needed to collect firewood,

¹⁴ Mwangiru, N. (2019) ¹⁵ Guvuro, S., & Booysen, F. (2021) ¹⁶ ILO (2021) ¹⁷ Jewkes, R., Gibbs, A., Jama-Shai, N., Willan, S., Misselhorn, A., Mushinga, M., Washington, L., Mbatha, N., & Skiweyiya, Y. (2014)

while steps such as the South African President's newly formed committee on rural women's land rights oppression are much needed.

Implications and recommendations

Based on the key findings, a number of practical recommendations and considerations can be drawn from the report's key findings - including practical actions to address common barriers while leveraging opportunities to increase women's economic empowerment. These are aimed at donors, policy makers, community leaders, programmers and researchers - including those engaged in WEE-focused programmes and initiatives, as well as those involved in more general economic development programming which may not have women's economic empowerment as a central aim. Noteworthy is that no single actor can independently address all the barriers/implement all the suggested recommendations to women's economic empowerment, and a coordinated, multi-pronged and multi-stakeholder approach to tackle barriers and execute solutions is required.

Note: Sector-specific recommendations for consideration are presented in sector briefs in section 5.

Key implications and recommendations for consideration - across three key areas: (i) Policy/Advocacy; (ii) Programming; and (iii) Research, monitoring and evaluation - are broadly summarised below. Please refer to section 6 for a more detailed breakdown of these implications and recommendations (including suggested strategies).

Policy/Advocacy

1. Address key policy gaps to improve protection of the informal workforce and improve the implementation of existing WEE-related legislation, policies and programmes.
2. Undertake community level sensitisation, capacity building and advocacy around existing legislation to strengthen women's rights.
3. Advocate to remove gender-based barriers to finance and promote women-friendly financial services.
4. Ensure inclusive policies for cooperative enterprises and women-led cooperatives/networks.

Programming¹⁸

1. Assess and address women's and girls' unpaid care and domestic work burden so that more of them can acquire marketable skills, and work for pay outside the household. Provision of climate smart and time-saving interventions for household work can be leveraged.

¹⁸ For stakeholders directly involved in women's economic empowerment initiatives and stakeholders involved in general economic development programming not solely focused on women. These stakeholders may be operating at local, national and/or regional levels.

- i. Address inequitable intra-household dynamics, norms and gender-based violence by supporting livelihoods and economic empowerment initiatives coupled with gender- transformative interventions which increase women's access to and control over assets and supporting household level interventions to discuss and negotiate gender roles and norms.
 2. Work with and grow women's collectives to build social, human and economic capital, and tackle normative barriers by providing market linkages.
 3. Work with women and girls holistically to improve their human capital and wellbeing by providing capacity building and skills trainings including TVET.
 4. Work with large employers to promote gender-sensitive and safe workplaces, for example by promoting the use of gender and GBV risk assessment tools, and support the implementation of evidence-based mitigation measures.
- groups of women including Black African women, migrants, women and girls with disabilities and those living with HIV/ AIDS.
2. This research should include measures of key factors enabling or constraining women's economic empowerment including gender-specific measures focused on women's capabilities and agency, household relations, and gender norms and attitudes.
 3. Disaggregate results by sex and include disaggregated targets such as income, age, race, disability, migratory status and geographic location. This should entail integrating gender statistics in all national surveys, with the aim of improving policy action based on robust gender statistics.
 4. Commission mixed-method research and evaluations on these research gaps/ issues to understand how and why change happens, and to better understand women's lived realities through participatory qualitative research, and theory-based evaluations.
 5. Monitor, track and mitigate against any signs of potential backlash during programme implementation, including increased rates of violence against women.

Research, monitoring and evaluation

1. Commission and undertake research and evaluations to address research gaps including prevalence and dynamics of economic violence against women, and action research to understand what works to address it. Also research to understand barriers faced by the most marginalised



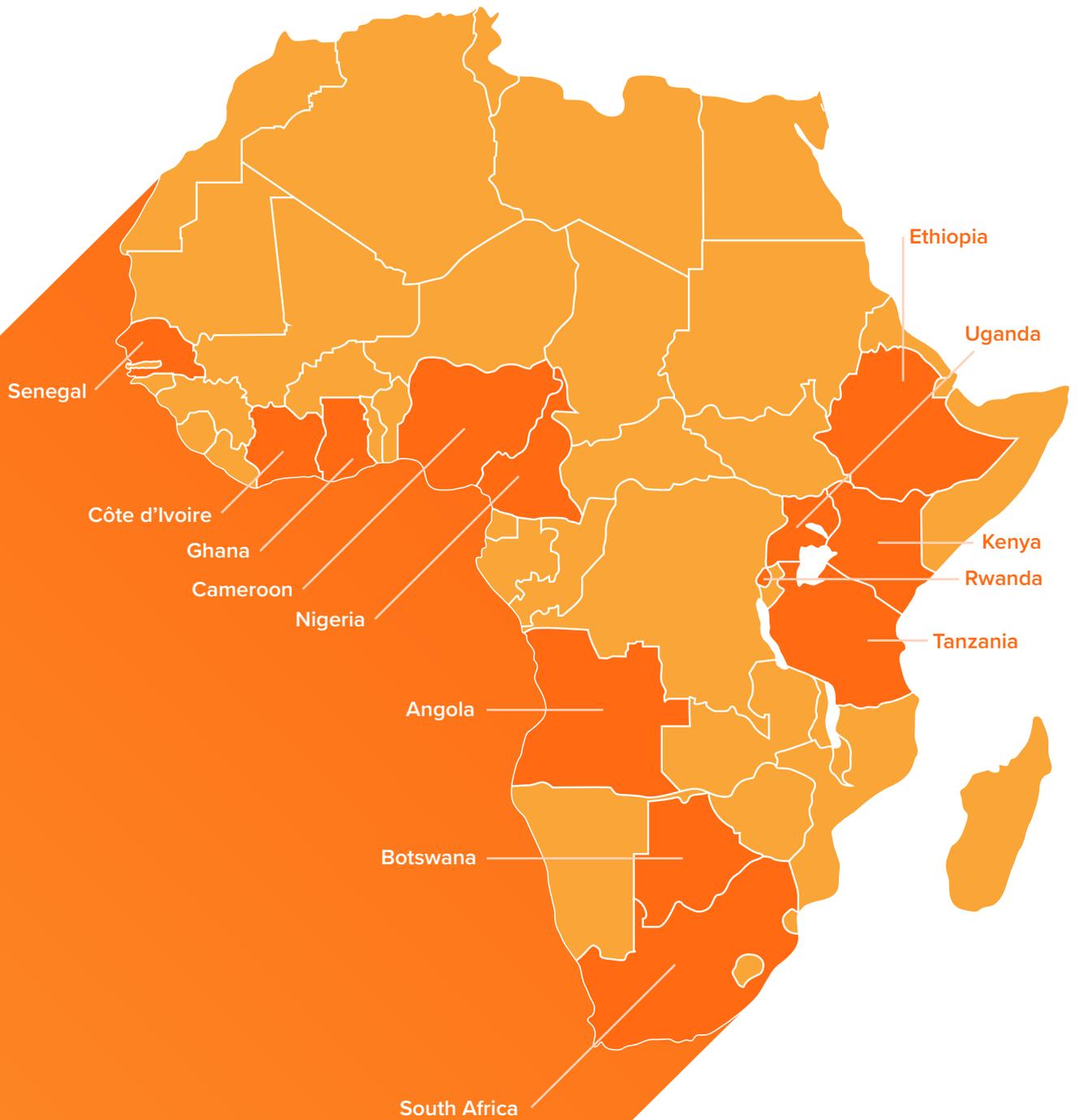
1. Introduction

Background and objectives

A study leveraging strong coalition to develop and implement country level strategies to strengthen women's economic empowerment in Sub-Saharan Africa

Euromonitor International in partnership with six other global organizations: (i) International Cooperative Research Group (ICRG), which is the research arm of the United States Overseas Cooperative Development Council (U.S. OCDC); (ii) United States Agency for International Development (USAID); (iii) Mastercard Foundation; (iv) International Development Research Centre (IDRC); (v) United Nations Entity for Gender Equality and the Empowerment of Women (UN Women); and (vi) the African Trade Policy Centre (ATPC), which is a specialised unit within the United Nations Economic Commission for Africa (UN ECA)¹⁹ (the Steering Committee), launched the Pathways Study in 2020. The aim was to assess which sectors hold the highest potential for women's economic empowerment, explore how women's prospects in these sectors can be strengthened in light of various barriers and drivers, and identify which stakeholders (public and private) are key to achieve this.

¹⁹ International Cooperative Research Group (ICRG), which is the research arm of the United States Overseas Cooperative Development Council (U.S. OCDC), United States Agency for International Development (USAID), Mastercard Foundation, International Development Research Centre (IDRC), United Nations Entity for Gender Equality and the Empowerment of Women (UN Women) and United Nations Economic Commission for Africa (UNECA). These seven organisations (including Euromonitor International) constituted the Steering Committee (SC).



The Steering Committee selected 13 countries in Sub-Saharan Africa for this exploration of the challenges and opportunities (sectoral and general) of the sub-continent related to women's economic empowerment. Three sub-regions were covered: East Africa, West Africa and Southern Africa, with the country selection including the major economic and political hubs in the SSA region. The Steering Committee's capabilities, country presence and areas/themes of interest (in terms of programming, research and advocacy efforts) were also considered to ensure uptake of the defined actionable solutions.

The Pathways Study programme addresses three key objectives per focus country. These are:

1. **Identifying the sectors with the most potential**
 - Which sectors are forecast to grow fastest over 2020-2030?
 - Which sectors have the greatest prospects for women's economic empowerment?
 - Which sectors would benefit the most from improved economic participation of women?
2. **Understanding the challenges and drivers for women's opportunities in key sectors**
 - What is the role of women within priority sectors and what are their prospects for expanded opportunities?
- What are the sector-specific drivers and barriers for women's employment, entrepreneurship and advancement?
- What works to improve/leverage these drivers and overcome these barriers?

3. **Developing sector-specific solutions**

- What are the actionable and sector-specific solutions, tailored to each country's/sector's context?
- Which stakeholders are well positioned to implement or advocate for these solutions?

Methodology summary

Euromonitor International designed the Pathways Study to have a sustained impact in each country by ensuring that results are locally relevant and actionable. From research design and scoping to development of recommendations, mixed methods (economic modelling, desk/secondary research, interviews and expert reviews) were utilised to develop findings and validate the proposed recommendations. The Steering Committee and selected country partners also reviewed the analysis of findings and solutions to ensure the actionability of the recommendations, such that in turn, action leads to positive change/impact for women.

The methodology workflow is shown below, while a detailed explanation of the methodology is included in Appendix 1.



1. Scoping Study and Modelling

Preliminary research and economic modelling

Euromonitor International Research and Analytics Team



2. Selection of 2-3 Focus Sectors

Sector Prioritisation Workshop
Country Working Group Participants

3.

Stakeholder Mapping

Secondary Research and Interviews

Euromonitor International Analysts

4.

Sector Deep Dives –

Primary and Secondary Research

Secondary Research and Interviews
Euromonitor International Analysts

5.

Analysis of Findings

Qualitative Analysis, Report Writing

Euromonitor International Analysts, Kore Global

6.

Report Finalisation



Recommendations Workshop, Expert Reviews

Country Working Group Participants, Euromonitor International Analysts, Kore Global, Thematic & Sector Experts, Steering Committee

2. Conceptual framework for understanding women's economic empowerment

Women's economic empowerment can be understood as:

“Women having the ability to succeed and advance economically, and the power to make and act on economic decisions to enhance their broader wellbeing and position in society.”²⁰

Women's economic empowerment is much broader than labour market participation.²¹ It involves both women's acquisition of resources and the exercise of power and agency in all economic domains and market-related interactions.²² It recognises that individual women operate within contexts of both informal (normative) and formal (structural) barriers and enablers.²³ And, as a result, women's economic empowerment is highly context-specific both in terms of women's aspirations and the enablers and barriers that they experience.²⁴

²⁰ Calder, R. et al. (2020)

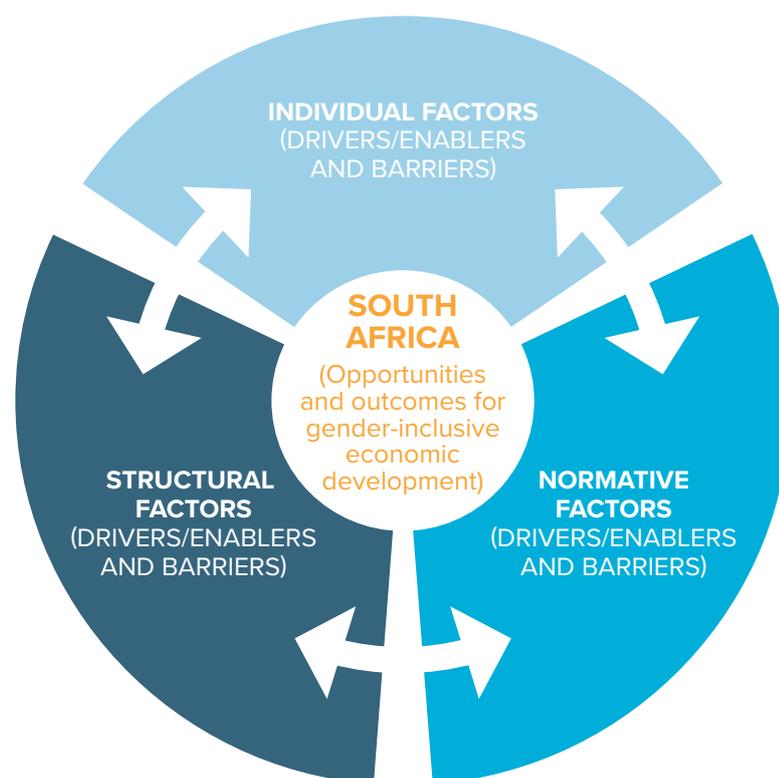
²¹ Nazneen et al. (2019)

²² Earning, spending, and saving income; buying, owning, and selling assets; holding and inheriting wealth; starting and operating a business; acquiring a bank account or credit (Fox and Romero, 2017)

²³ Kabeer (2021); Fox and Romero (2017)

²⁴ Calder, R. and Boost, E. (2020) Unpublished; Fox and Romero (2017); Field et al. (2010); Hanmer and Klugman (2016)

Conceptual framework for understanding women's economic empowerment



This report applies a holistic framework to understand barriers and enablers to women's economic empowerment in South Africa at three distinct levels: (i) Structural; (ii) Normative; and (iii) Individual.

Factors at these three levels combine and interact to influence WEE opportunities and outcomes. For example, barriers at different levels can interact to limit women's opportunities to collectively engage in and shape market institutions; their access to suitable services and assets; and their choices

relative to men's, thereby leading to greater engagement in marginal, unregulated and precarious forms of work with low and unstable earnings, and no social protection. Segregation and discrimination can occur along several fronts - employment, status in value chains, profit potential and level of risk - and is stubbornly persistent in informal labour markets despite low barriers to entry. All these due to the vicious interplay between individual, normative and structural constraints.

Structural factors

Government policies, laws and regulations - whether formulated at the national or sub-national level - create a structure that directly or indirectly constrains women's participation in the economy.

Macro-level economic policies are often thought of as “gender neutral”, as they cover policy areas such as public and private investment, macroeconomic stability, rules for international trade, financial regulatory powers and policies, and public expenditure allocation and management. In most cases, these policies are not designed with WEE outcomes in mind, but they affect women and men differently because of their different positions in the economy and society, shaped and reinforced by existing gender norms.

Examples of policies that directly influence women's ability to start, run and grow their businesses include:

- Macro-level economic policies around trade and taxation;
- Credit and finance policies;
- Regulations around access to markets; and
- Laws (including customary law) on property ownership and inheritance.

Policies can also indirectly influence women's economic empowerment.

These may include:

- Policies on the marketisation and subsidisation of the care economy and the recognition of unpaid care responsibilities;
- Education policies that support girls' and young women's participation and achievement, and their pathways to employment; and
- Prevention and response mechanisms to gender-based violence (GBV).

Normative factors

Gender norms circumscribe women's capabilities well before they enter the labour market, as norms affect the whole skill development process of children and youth; for example, how much and what kind of education and other learning opportunities are made available.²⁵ Norms invest dominant household members, usually men, with the authority to determine how resources are allocated and how women and girls use their time.²⁶ The role of gender norms and relational agency is thus important to examine as a factor enabling or constraining women's economic outcomes.

Social and gender norms around women's economic empowerment are not static, and large-scale macro level changes in for example educational levels or conflict situations, as well as the hard work and advocacy of women's rights movements can drive positive shifts in behaviour and attitudes over time.

²⁵ Calder, R. et al. (2021) ²⁶ Kabeer (2021)

Norms play an important role in explaining many labour market phenomena, such as persistent gender segregation, low or declining female labour force participation (FLFP), women's lower returns to human capital and experience in the world of work, women's double burden of paid and unpaid work, household decision-making, the aspirations of women and girls,²⁷ and the availability of relevant products and services for women in the market (for example, financial products and services, good quality affordable childcare, and private/domestic infrastructure). These gendered norms focus on five key areas:

- **Women's time use**, including responsibilities assigned to women for domestic and care, paid work, and leisure time;
- **The desirability, suitability and respectability of different types of activity and work** for men and women, including whether girls and young women should attend school, acquire certain skills (e.g., digital literacy), whether women should work outside of the home, work in mixed gender environments, and run a business;
- **Voice, representation and leadership in decision-making** in the household, the community, the market and the state;
- **Women's freedom of mobility**; and
- **The frequency, intensity, and acceptability of violence against women and girls (VAWG) including sexual harassment.**

Individual capital factors

Capital can be embedded in human beings (human capital), embedded in society (social capital), or possessed in the form of a tangible asset, by an individual, a household, or a group (economic capital). Capital is especially important for women entrepreneurs to navigate the “structures of constraint” they face in doing business. Yet evidence suggests that women suffer capital deficits relative to men, and that this affects their performance.²⁸

Human capital includes business, entrepreneurial, vocational and sectoral information, knowledge and skills, and an understanding of rights, key policies and regulations. It also encompasses: basic cognitive skills such as literacy and numeracy; financial and digital skills; and social-emotional skills such as aspiration, self-esteem, goal setting, and communication. Uneven investments in girls' and young women's human capital create “pre-existing” constraints that are exacerbated through unequal access to market services, opportunities and economic and social capital.²⁹

²⁷ Marcus (2021) ²⁸ McKenzie et al. (2021); Batista et al. (2021) ²⁹ Calder, R. et al. (2021)

The exercise of individual choice is significantly enabled by stores of social capital. Social capital refers to networks, rooted in norms and social trust, that facilitate coordination and cooperation for mutual benefit, that are informed by long-standing values of solidarity and mutuality.³⁰ Women are often further constrained by their disproportionate reliance on horizontal social networks - connections and relations between those in similar socioeconomic situations - as compared to vertical networks with people of different socioeconomic standing. However, horizontal social capital can be valuable to women insofar as it enables them to join with others in collective action, for example through collective enterprises.

Finally, economic empowerment requires women to access and control economic capital, including: financial assets such as earnings, savings, and investments; productive assets such as business equipment (including phones), inventory and inputs, livestock, and land; and private/domestic infrastructure assets such as fuel-efficient stoves, durable housing and reliable power sources that increase women's ability to engage in paid work.³¹

Given an enabling environment, these interlinked forms of capital support women to exercise greater choice and agency in relation to their work.

Therefore, the lack of capital is more of a problem for women: firstly, because systemic and structural constraints allocate more opportunities to build capital to men; and secondly, because women need more capital than men simply to overcome structural constraints and engage in markets productively and profitably.³²

³⁰ Adato and Hoddinott (2008) in Calder and Tanhchareun (2014) ³¹ Calder, R. et al. (2021) ³² Calder et al. (2021)



3. Country context

3.1 Demographics and geography

South Africa is the southernmost country on the African continent, bordered by Namibia, Botswana, Zimbabwe, Eswatini, and surrounding neighbouring Lesotho.³³ South Africa's population, estimated at 60.1 million in 2021,³⁴ is concentrated along its southern and southeastern coast, and in the eastern half of the country.³⁵ The country is rapidly urbanising; in 2019 more than six in every 10 South Africans (66.8%) lived in urban areas,³⁶ while about a third of the population lives in rural areas.³⁷ Women constitute 51% of South Africa's population.³⁸

³³ The Commonwealth (2022)

³⁴ Stats SA (2021a)

³⁵ CIA World Factbook (2020a)

³⁶ World Bank Open Data

³⁷ World Bank Open Data

³⁸ Stats SA (2021a)



South Africa has a relatively young demographic profile, with over a quarter of the population (28.8%) aged under 14 years old,³⁹ and a median age of 27.9 years.⁴⁰

Despite a young population, in contrast to its SSA neighbours where a population boom is expected to persist over the next decade, population growth has remained less than 1.6% per year since 2002.⁴¹

According to 2021 population estimates by Statistics South Africa, the majority of South Africa's population is Black African (81%), while 8.8% is Coloured,⁴² 7.8% is White and 2.5% is Indian/Asian. Women make up 51% of the population.⁴³ Historically, Black South African women suffer “triple marginalisation” precipitated by race, sexism and social class.⁴⁴

The constitution recognises 11 official languages including Sepedi (also known as Sesotho sa Leboa), Sesotho, Setswana, siSwati, Tshivenda, Xitsonga, Afrikaans, English, isiNdebele, isiXhosa and isiZulu.⁴⁵ According to household data from 2013, most people in the country (84.2%) describe their religious affiliation as Christian, 5% of the population follow ancestral, tribal and other traditional religions, 2% of people identify as Muslim, 1% of people identify as Hindu and

0.2% Jewish. A further 5.5% of people identify as “nothing in particular”.⁴⁶

Over a third of all households in South Africa are headed by women. Female-headed households, which are typically concentrated in lower-wage occupations and burdened by unpaid care and domestic work, represent 41.9% of total households in the country.⁴⁷ Historical reasons for the increasing numbers of female-headed households in post-apartheid South Africa include labour migration (by either male heads or females), conflict and socio-cultural changes eroding the more traditional extended family structure, and the high burden of HIV/AIDS.⁴⁸

It is estimated that the national disability prevalence in South Africa is 7.5%, with more women living with disabilities (8.3%) than men (6.5%).⁴⁹ People with disabilities experience discrimination and marginalisation, including difficulty accessing education and employment opportunities.⁵⁰ Furthermore, households that are headed by people with disabilities have less access to basic services, and there are disparities associated with affordability and accessibility of assistive devices among different population groups and geographies.⁵¹

³⁹ World Bank Open Data (2019b) ⁴⁰ Euromonitor International Passport (2021) ⁴¹ Statistics South Africa (2021a)

⁴² The term “coloured” is used in South Africa, including in the national census, for persons of mixed-race ancestry. This segment of the population has developed a distinct cultural identity over several hundred years. CIA World Factbook (2020b)

⁴³ Statistics South Africa (2021a) ⁴⁴ Akala, B. (2018) ⁴⁵ South Africa Gateway (2021) ⁴⁶ Note: The remainder of the population identify as atheist/agnostic (0.2%), “something else” (0.1%), refused and do not know (0.3%), unspecified (1.6%). Statistics South Africa (2014)

⁴⁷ Euromonitor International (2020) ⁴⁸ Nwosu, C and Ndinda, C (2018) ⁴⁹ Statistics South Africa (2014) ⁵⁰ Statistics South Africa (2014)

⁵¹ Statistics South Africa (2014)

Given South Africa's strategic location and relative economic stability, it has a large immigrant and refugee population.⁵² Nearly 4.8% of the population are migrants, including 43.1% women and 11.1% young people aged 19 and younger.⁵³ Between 2010 and 2019, the net number of migrants doubled from two million to four million, then dipped to 2.9 million by mid-2020.⁵⁴ In 2020, the most frequent migration routes were the Mozambique-South Africa (750,000 people) and the Zimbabwe-South Africa (375,000 people) migration corridors.⁵⁵ Intra-regional labour migration is common from Eswatini, Lesotho, Malawi and Zimbabwe.⁵⁶

An estimated 35% of asylum claims are made by women, fleeing conflict affected countries including Somalia, the Democratic Republic of Congo (DRC), Ethiopia, Burundi and Zimbabwe.⁵⁷ In 2019, there were approximately 188,300 asylum seekers in the country.⁵⁸ Refugees have the right to seek employment or self-employment, although there are limitations on certain categories of asylum seekers' right to work.⁵⁹

Almost half of migrant women work in the informal sector, where they lack adequate social safety nets (for example unemployment insurance and other social protection benefits).⁶⁰ Approximately a quarter of migrant women work as domestic workers, characterised by often exploitative and

precarious working conditions. Furthermore, one in three migrant workers works excessive hours.⁶¹ Access to the formal sector is hindered by regulatory restrictions on migrants' qualifications for critical-skills jobs.⁶² Also, the migrant population includes an unknown proportion of migrant women who remain undocumented, and subsequently are restricted in their ability to gain meaningful and long-term employment, or access social safety nets.⁶³

With women constituting a majority of the agricultural workforce, they remain especially vulnerable to the effects of climate change on South Africa's natural resources, biological diversity and economic growth.⁶⁴

Climate change and extreme weather patterns are major impediments to an economy highly dependent on agriculture for livelihoods.⁶⁵ Since the 1960s, South Africa has experienced an increase in mean, maximum and minimum temperatures ranging from 1-1.5 degrees Celsius on average.⁶⁶ Continued changes to the temperature and erratic rainfall patterns risk leading to further depletion of water resources, floods and droughts, with significant implications for economic growth.⁶⁷ During times of climate-induced crises, women's workload increases, as demands for paid and unpaid work (including domestic and care responsibilities) increase. This results in women working longer hours and experiencing significant time poverty.⁶⁸

⁵² Migrant Refugees (2021) ⁵³ Migrant Refugees (2021) ⁵⁴ Migration Portal (2021) ⁵⁵ Migrant Refugees (2021) ⁵⁶ Migrant Refugees (2021) ⁵⁷ Freedman, J., Crankshaw, T.L., & Mutambara, V. (2020) ⁵⁸ Migrant Refugees (2021) ⁵⁹ Migrant Refugees (2021) ⁶⁰ Statistics South Africa (2020) ⁶¹ Statistics South Africa (2020) ⁶² CIA World Factbook (2020d) ⁶³ Mukumbang, F.C., Ambe, A.N. & Adebijoyi, B.O. (2020) ⁶⁴ Mokoena, N., & Dolan, M. (19 July 2020) ⁶⁵ USAID Climate Links (2016) ⁶⁶ USAID Climate Links (2016) ⁶⁷ United Nations Development Programme UNDP (n.d.) ⁶⁸ Babugura, A. (n.d.)

3.2 Human development

South Africa has made substantial progress on human development indicators. South Africa is ranked 114 out of 189 countries and territories as per the 2020 Human Development Index (HDI).⁶⁹ With an index value of 0.709, the country is positioned in the “high human development” category.⁷⁰ The HDI value of the country has increased by 13.1% between 1990 and 2019.⁷¹ However, despite improvements over the last two decades, poverty reduction has stalled in recent years amid a myriad of developmental challenges. The South African population experiences significant socioeconomic disparities.⁷²

Women and female-headed households are more likely to live in poverty. This is mainly due to wage inequality, unpaid care work and fewer available job opportunities.⁷³ Female-headed households are 40% poorer than those headed by men.⁷⁴ Female-headed households are 6% more likely to experience complete household unemployment than male-headed households,⁷⁵ while 48% of female-headed households, versus 23% of male-headed households, support extended family members.⁷⁶ This means that even with a narrowing wage gap, women’s earning potential is significantly stretched compared with that of their male counterparts. Given the strong link between poverty and female-headed households in South Africa, poverty will remain a significant challenge if the link between female headship and poverty is not addressed.⁷⁷

Indicator	Female	Male
Population* under poverty line in South Africa, % (2019)	19.7	18.2
Population* under poverty line, average for Sub-Saharan Africa, % (2019)	44.2	43.5
Households in poverty by household head's sex, % (2020)	12.3	11.4

Note: *The indicator is based on the country’s total female/male population
Source: UN Women, Statistics South Africa

⁶⁹ United Nations Development Programme UNDP (2020) ⁷⁰ United Nations Development Programme UNDP (2020)

⁷¹ United Nations Development Programme UNDP (2020) ⁷² World Bank (2020) ⁷³ Human Development Index Report (2020)

⁷⁴ Bosch, A., & Barit, S. (2020) ⁷⁵ Nwosu, C and Ndinda, C (2018) ⁷⁶ Bosch, A., & Barit, S. (2020) ⁷⁷ Nwosu, C and Ndinda, C (2018)

In response to high levels of poverty and unemployment, the South African government has a substantial social safety net programme. In order to stop the most vulnerable households from falling further into poverty, by the end of the period 2020/2021, the South African Social Security Agency (SASSA) provided income support to almost 11.5 million vulnerable individuals and households throughout the country with social assistance.⁷⁸ These social benefits account for 11% of national government expenses, and represent a 17% increase compared with 2018/2019 due to increases in social grant payments.⁷⁹ This includes a COVID-19 social relief of distress grant of ZAR350 per month to support poor households during the pandemic, recently extended in the 2022 to cover an additional 12 months.⁸⁰

South Africa has made great strides towards greater gender equality, with significant improvements in women's education and health outcomes, as well as formal labour force participation. South Africa was ranked 18 out of 156 countries in the World Economic Forum's Global Gender Gap 2021 Report.⁸¹ The country has made significant improvements in educational and health outcomes. Unlike in many other SSA countries, women's labour force participation in South Africa, at 51.3% of the female population in Q1 2021, exhibits strong engagement in the formal sector.⁸² Employment in the non-agricultural formal sector accounts for a notable 42.9% of the country's total female labour force⁸³ - compared to 9.2% of women working in the non-agricultural informal sector.⁸⁴

⁷⁸ Parliament Budgetary Office (2021) ⁷⁹ Statistics South Africa (2021b)

⁸⁰ <https://www.sanews.gov.za/south-africa/government-extends-r350-covid-19-grant-12-months>

⁸¹ World Economic Forum (2021) ⁸² World Bank (2021) ⁸³ World Bank (2021) ⁸⁴ World Bank (2021)

A review of global gender indices demonstrates that South Africa is performing better than its neighbouring countries in Sub-Saharan Africa, although there remain notable gaps to achieving gender equality.

Index	Score	Insights on score
<p>Africa Gender Index (2019) Composite measure of parity between men and women across three dimensions (economic, social and empowerment/representation) <i>(closer value to 1 indicates less inequality; score of 1 implies parity between men and women)</i> Africa average: 0.486 Southern Africa average 0.613⁸⁵</p>	0.768	Dimensional scores include: Economic (0.686), Social (1.062) and Empowerment/Representation (0.621). South Africa is making efforts to address the gender gap in STEM studies through its Taungana (coming together) programme for secondary school girls
<p>Gender Inequality Index (2019) Composite measure reflecting inequality in reproductive health, empowerment and labour <i>(lower score is better)</i> Global average: 0.436 SSA average: 0.570⁸⁶</p>	0.406	45.3% of parliamentary seats are held by women, and 75% of adult women have reached at least a secondary level of education. Female participation in the labour market is 49.6% compared to 62.7% for men
<p>Global Gender Gap Report (2021) Economic participation and opportunity, educational attainment, health and survival, political empowerment <i>(higher score is better)</i> Global average: 0.677 SSA average: 0.672⁸⁷</p>	0.781	Only 30.2% women work as legislators, senior officials and managers (vs 69.8% men)
<p>Women's Workplace Equality Index (2018) Accessing institutions, building credit, getting a job, going to court, protecting women from violence, providing incentives to work and using property. <i>(higher score is better)</i> Global average: 64.79 SSA average: 57.86⁸⁸</p>	84	Despite above-average workforce participation, there remain challenges around performance on incentives to work including lack of guarantee of equivalent position after maternity leave and childcare tax-deductibles

 = Among the top scoring countries in SSA  = Among the lowest scoring countries in SSA  = Average score based on SSA averages

⁸⁵ African Development Bank (AfDB) & UN ECA (2019) ⁸⁶ Human Development Reports (2021) Gender Inequality Index (GII)

⁸⁷ World Economic Forum (2021). Global Gender Gap report 2021 - Insight Report ⁸⁸ Council on Foreign Relations (n.d.)

Index	Score	Insights on score
<p>SDG Gender Index (2022) 14 of the 17 Sustainable Development Goals (SDGs) and 51 issues ranging from health, gender-based violence and climate change <i>(higher score is better)</i> Global average: 67.8 SSA average: 52.0⁸⁹</p>	70.9	<p>Close to average on the following aspects:</p> <ul style="list-style-type: none"> - SDG10 Reduced Inequalities (63.5) - SDG16 Peace and Institutions (42.9) - SDG17 Partnerships (67.0)
<p>Gender Parity Score (2019) Measures distance from gender parity and takes into consideration gender equality at work and in society <i>(higher score is better)</i> Africa average: 0.58⁹⁰</p>	0.76	<p>South Africa has the highest gender parity score (GPS) in Africa, though this still indicates medium gender inequality</p>
<p>Women, Business and the Law (2021) Measures legal regulations affecting women's economic opportunity via eight indicators: mobility, workplace, pay, marriage, parenthood, entrepreneurship, assets and pension <i>(higher score is better)</i> Global average: 76.1 SSA average: 71⁹¹</p>	88.1	<p>Despite being above global and SSA average vis-a-vis women, business and law, South Africa performs poorly on laws affecting the size of a woman's pension. There's also a need for improving the laws affecting women's work after having children. Periods of absence due to childcare are not accounted for in pension benefits</p>

= Among the top scoring countries in SSA
 = Among the lowest scoring countries in SSA
 = Average score based on SSA averages

⁸⁹ <https://www.equalmeasures2030.org/2022-sdg-gender-index/regions-2/sub-saharan-africa/>

⁹⁰ Moodley, L., Kuyoro, M., Holt, T., Leke, A., Krishnan, M., & Akintayo, F., (2019) ⁹¹ World Bank (2021)

South Africa ranks 69 on educational attainment in the World Economic Forum’s Global Gender Gap Index 2021 and has closed 99% of its gender gap in this area.⁹² Women’s educational outcomes are higher in South Africa than the SSA average. Approximately 86.5% of women are literate, 86.7% of girls are enrolled in primary school and 78.5% of girls enrolled in secondary school. More young women go on to further their education than young men with 26.4% of young women enrolled in tertiary education.⁹³ These improvements in education can be attributed to post-apartheid legal and policy reforms addressing gender and race marginalisation including affirmative action designed to improve general access to education for Black African women and other marginalised groups.⁹⁴

Indicator	South Africa		SSA average	
	Female	Male	Female	Male
Literacy rate*, %	86.5	87.7	58.9	72.2
Enrolment in primary education, %	86.7	87.3	72.4	78.1
Enrolment in secondary education, %	78.5	65.4	40.6	45.9
Enrolment in tertiary education, %	26.4	18.4	8.2	10.7

Note: *Percentage of the adult population (over 15 years of age) of each gender with the ability to both read and write and make simple arithmetic calculations. Source: World Economic Forum Global Gender Gap Report (2021)

Sexual and reproductive health (SRH) challenges and a large, generalised HIV epidemic and gender-based violence (GBV) continue to affect women’s and girls’ wellbeing. South Africa’s fertility rate, at 2.4 births per woman,⁹⁵ remains lower than the SSA average of 4.6 births per woman.⁹⁶

However, with a contraceptive prevalence rate of 49.4% in 2019, 14.9% of women still have an unmet need for a modern method of contraception.⁹⁷ Consequently, there were over one million unintended pregnancies in 2018-2019.⁹⁸ The COVID-19 pandemic and subsequent social and economic effects also exacerbated the number of teenage pregnancies, where the most populous province Gauteng experienced a jump of 60%

since the start of the pandemic.⁹⁹ Furthermore, there continue to be barriers associated with accessing safe abortion services including unwillingness of staff to offer abortion services on grounds of religion; limited facilities designated to provide abortions; and poor information dissemination about where to access services.¹⁰⁰ However, despite these challenges, improvements have been made in reducing the maternal mortality facility ratio (MMFR), where the ratio decreased from 105.9 to 88 deaths per 100,000 live births between 2019 and 2020.¹⁰¹

With more than 7.5 million people living with HIV, South Africa faces one of the largest HIV epidemics globally. The disease

⁹² World Economic Forum (2021) ⁹³ World Economic Forum (2021) ⁹⁴ Akala, B. (2018) ⁹⁵ The World Bank Open Data

⁹⁶ The World Bank Open Data ⁹⁷ FP (2020) ⁹⁸ FP (2020) ⁹⁹ ReliefWeb (2021) ¹⁰⁰ Solomons, N., & Gihwala, H., (2021)

¹⁰¹ Statistics South Africa (2022)

has been responsible for a larger-than-normal dependent population and low life expectancy.¹⁰² More than 200,000 infections occur every year with 18.9% of adults (and children) aged 15 or older infected with the virus.¹⁰³ While the proportion of people who know their HIV status is steadily increasing, the share of people who have access and knowledge of antiretroviral therapy (ART) remains remarkably low.¹⁰⁴ Women in South Africa are particularly vulnerable to contract HIV¹⁰⁵ for reasons including lack of awareness and limited prioritisation of young women's SRH rights.¹⁰⁶

According to the 2016 demographic and health survey (DHS), over one in five women aged 18-50 years (21.3%) have experienced physical or sexual violence by an intimate partner in their lifetime.¹⁰⁷ Additionally, according to crime statistics, 902 women were murdered in the period October to December 2021, with 232 of these directly linked to domestic violence.¹⁰⁸ At the same time, 11,315 rape cases were reported. While it is noted that there was a 9% decrease in sexual offences, the statistics often do not reflect cases that are under-reported.¹⁰⁹ Gender-based violence was exacerbated by the COVID-19 pandemic, which resulted in a 1.7% increase in cases of rape recorded, with over 53,000 cases in 2020 alone.¹¹⁰ In response, President Ramaphosa has publicly labelled gender-based violence as a “second pandemic”, and

in 2022 signed into law legislation aimed at strengthening efforts to end gender-based violence, including a new Domestic Violence Amendment Bill which broadens definitions of forms of violence to include coercive and controlling behaviours (further discussed in section 4).¹¹¹

3.3 Status of the economy, labour force participation and employment

South Africa is one of the largest economies in Sub-Saharan Africa and one of the largest economies on the African continent.¹¹²

South Africa's gross domestic product (GDP) increased nearly fourfold between 2002 and 2011, reaching USD351.4 billion in 2011. Economic growth has subsequently declined, with GDP at USD296.3 billion in 2016 before picking up to USD368.3 billion in 2018.¹¹³ GDP per capita has also dipped from its 2011 peak, decreasing by 25% from USD8,001 in 2011 to USD6,001 in 2019.¹¹⁴

Indicator	Value	Source
GDP in 2020, USD million	301,924	World Bank
GDP Growth, %	2020	-6.96
	2021F	3.80
	2025F	1.30
Debt-to-GDP ratio in 2020, %	77.1	Euromonitor Passport
	2010	4.06
	2015	4.51
Inflation, %	2020	3.22
	2021F	4.40
	2025F	4.50
		IMF

Note: F=Forecast

Source: Euromonitor International, Passport; World Bank; IMF

¹⁰² World Bank Open Data ¹⁰³ Kim, H., Tanser, F., Tomita, A., Vandormael, A., & Cuadros, D. F. (2021) ¹⁰⁴ Kim, H., Tanser, F., Tomita, A., Vandormael, A., & Cuadros, D. F. (2021) ¹⁰⁵ Galappaththi-Arachchige, H. N., Zulu, S. G., Kleppa, E., Lillebo, K., Qvigstad, E., Ndhlovu, P., Vennervald, B. J., Gundersen, S. G., Kjetland, E. F., & Taylor, M. (2018) ¹⁰⁶ SCI Foundation (n.d.) ¹⁰⁷ UN WOMEN (n.d.)

¹⁰⁸ Nyoka, B. N., Eliseeva, I. A., & News. (2022) ¹⁰⁹ Nyoka, B. N., Eliseeva, I. A., & News. (2022)

¹¹⁰ Modise, K. (n.d.) ¹¹¹ Ellis, E. (2020); South African Government (2022) ¹¹² Bloomberg (2020b)

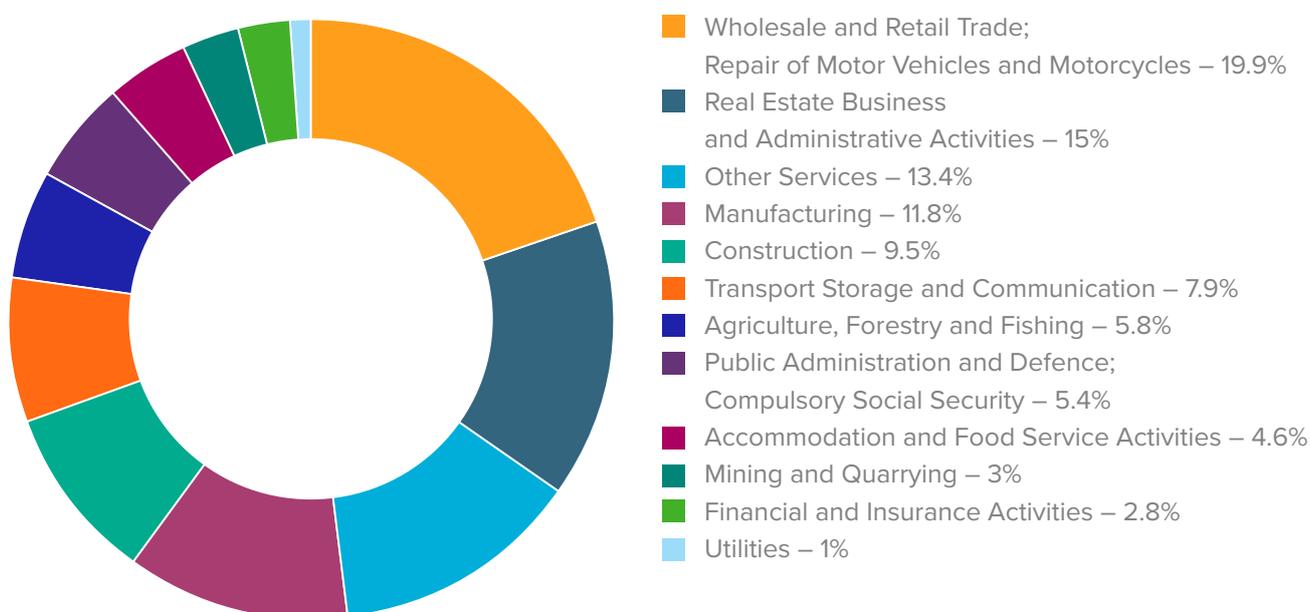
¹¹³ World Bank Open Data ¹¹⁴ World Bank Open Data

South African policymaking has long advocated for a market-based, equal-opportunity, open economy, supported by liberalised trade and a sophisticated banking system.¹¹⁵

Compared with neighbouring SSA economies, South Africa boasts a diversified economy.

In 2019, the services sector (including wholesale and retail trade) remained the largest employer at 68.9% of the full-time labour force, followed by the industrial sector (25.2%, with 11.8% in manufacturing). In contrast to other SSA countries, agriculture is a modest employer, accounting for just 5.8% of the total South African full-time labour force.¹¹⁶

Breakdown of Full-Time Total Labour by Sector (2019)



Source: International Labour Organization (ILO) estimates

The country's Special Economic Zone (SEZ) programme supports economic diversification. Since 2007, SEZ prioritisation has targeted FDI and exporting value-added commodities, putting SEZ regions at the forefront of economic development. These include Eastern Cape, Western Cape, KwaZulu-Natal, Gauteng, Limpopo and

Mpumalanga provinces. Communities in regions hosting SEZs in general benefit significantly from private and public sector investments, which often result in earnings above national average, higher standards of living, increased employment, and reduced poverty and inequality.¹¹⁷

¹¹⁵ BTI Project (2020). South Africa country report

¹¹⁶ International Labour Organization (2020)

¹¹⁷ The Mail & Guardian (2019)

Structural reforms for higher and inclusive growth after a decade of stagnant economic growth are underway. They include the modernisation of network industries (telecommunications, electricity, and transport), the redirection of trade policies towards the free trade area in Africa, the creation of a lower-barrier market for new business establishment and free market competition,¹¹⁸ and a refocus on labour-intensive sectors such as tourism and agriculture. Mega projects, such as the Lanseria Smart City (covering 350,000 to 500,000 people) and investments of up to USD8 billion under the Infrastructure Investment Plan, are among many planned developments.¹¹⁹

Over the next decade, the services sector - namely public services and wholesale and retail trade - are expected to continue to enjoy accelerated growth in GVA terms (at CAGRs of 8.5% and 7.1%, respectively), as will the utilities sector (at a CAGR of 12%), while transport, storage and communications, and hospitality are expected to plateau.¹²⁰

South Africa's diversified economy has not yet translated into a diversified job market for women. Total female labour force participation is estimated at 44.6% in 2021.¹²¹ The services sector employs 67% of women, and more so in wholesale and retail trade, as well as real estate business and administrative activities.¹²² The informal sector accounts for 48% of Women's Vulnerable Employment

(WVE) and 10% of female employment.¹²³ Women are more likely to work in low-skilled jobs (36.2%) compared to men (14.4%), and only 11.7% of women work in higher skilled roles compared to 24.8% of men. Similarly, only 5.7% of women are employed as managers.¹²⁴ Income and wage inequality most severely impacts Black African women, who have been constrained to informal employment and domestic work (6% of South Africa's workforce) due to historical apartheid laws.¹²⁵

Men continue to dominate in business ownership. An estimated 78.5% of businesses are owned by men, while just 21.5% are owned by women.¹²⁶ The largest self-employed group of the population is Black African women, with most engaged in informal businesses.¹²⁷ While most female entrepreneurs are involved in small enterprises, women are also moving up the business ladder to occupations such as property development, franchising and manufacturing.¹²⁸

The total unemployment rate has been steadily rising since 2015, with women particularly affected. In 2020, the unemployment rate reached 28.7%¹²⁹ with women more likely to be unemployed (36.8%) than men (32.4%) in the second quarter of 2021.¹³⁰ Gender inequality in access to employment is particularly striking for youth (aged 15-34), with 43.9% of young women unemployed compared to 36.4% of young men.¹³¹

¹¹⁸ IMF (2020) ¹¹⁹ South African Government (2021) ¹²⁰ Euromonitor International 2020 ¹²¹ World Bank (2021) <https://data.worldbank.org/indicator/SL.TLF.TOTL.FE.ZS?locations=ZA> ¹²² Euromonitor International (2020) ¹²³ Statistics South African (2021)

¹²⁴ Mosomi, J. & UNU-WIDER. (2019) ¹²⁵ Samman, E., Letouze, E., & Oliver, N. (2020) ¹²⁶ Mastercard Foundation (2019)

¹²⁷ International Finance Corporation IFC (2006) ¹²⁸ International Finance Corporation IFC (2006)

¹²⁹ World Bank Open Data ¹³⁰ Statistics South African (2021) ¹³¹ Statistics South Africa (2019)

The country’s significant gender pay gap in middle-to-upper levels of wage distribution has remained “stubbornly stagnant” on the back of opaque transparency mechanisms.¹³² South Africa’s gender wage gap is currently around 23-35%; this is despite a narrowing of the gender wage gap for lower-paid jobs amid the introduction of a national minimum wage over the years, and currently set at ZAR23.19 effective 1 March 2022.^{133,134} This gap is higher for women with no education (54% of income earned by men), women with high-school education (68% of income earned by men) and women with tertiary education (63% of income earned by men).¹³⁵

The COVID-19 pandemic and subsequent national lockdowns have significantly disrupted economic activity and strained labour markets. The country entered a strict lockdown towards the end Q1 2020, with the economy losing over half a million jobs in the period between December 2019 and December 2020, most of which were lost in Q2 of 2020.¹³⁶ As a consequence, economic growth is estimated to have contracted by 8% in 2020. This contraction was largely driven by the impact of strict lockdown regulations, combined with a decline in investment, exports and private consumption.¹³⁷ During the COVID-19 pandemic, women in particular bore the brunt of job losses between February and April 2020,¹³⁸ and this trend has been sustained into 2021. Of the three million

people who lost their jobs since the start of the pandemic, two million are women.¹³⁹

With the easing of COVID-19 restrictions and subsequent reopening of the economy, half of COVID-19-related job losses were recovered by October 2020.¹⁴⁰ However, for women who on average suffered most from job losses, the rebound has been slower. Women have been disproportionately affected by increased unemployment since they tend to be concentrated in lower-paid, contact-intensive sectors that have been hardest hit by COVID-19-related restrictions. Female-headed households have been particularly vulnerable due to their higher poverty levels pre-pandemic.¹⁴¹ Changes in school and working conditions have also amplified the unequal burden of unpaid care and domestic work carried mostly by women.

Sectors hit hardest by the pandemic were those related to service delivery. The COVID-19 crisis also brought to a halt the manufacturing and mining sectors, translating into a USD18.2 billion loss in government revenue for 2020.¹⁴² In 2020, the country’s interest rates were the lowest they had been in 16 years,¹⁴³ although by 2022 interest rates are predicted to reach 5.9%.¹⁴⁴ In response to the pandemic, the government prioritised child hunger alleviation, wage support through the Unemployment Insurance Fund (UIF) and emergency procurement for the health sector.¹⁴⁵

¹³² Bosch, A., & Barit, S. (2020) ¹³³ Bosch, A., & Barit, S. (2020) ¹³⁴ LWO (2022) ¹³⁵ Citypress (n.d.) ¹³⁶ Statistics South Africa (2020) ¹³⁷ IMF (2021) ¹³⁸ IMF (2020) ¹³⁹ Business & Human Rights Resource Centre (n.d.) ¹⁴⁰ IMF (2022) ¹⁴¹ Chitiga, M., Henseler, M., Mabugu, R. E., & Maisonnave, H. (2021) ¹⁴² IMF (2020) ¹⁴³ Statistics South Africa (2021c) ¹⁴⁴ Winning, A., & Kumwenda-Mtambo, O. ¹⁴⁵ IMF (2020)

The government has extended a lifeline to small and medium-sized enterprises (SMEs), including a loan guarantee programme of up to 4% of GDP, as well as state-owned enterprise loans of up to 11% of GDP.¹⁴⁶ The country has also aggressively loosened its monetary policy to stimulate the economy.¹⁴⁷

Although the COVID-19 pandemic has exacerbated South Africa's crippling debt burden and unemployment rate, economic growth was expected to rebound in 2021 as the country gradually reopened. Commitment to better governance, exemplified by the government's decision

to institute independent audits of spending during the COVID-19 pandemic, was expected to result in a positive growth trajectory¹⁴⁸ but this has been overshadowed by extensive power cuts which have crushed any hope of an economic recovery. Under its pandemic response, South Africa outlined a longer-term economic stabilisation phase, firstly through a USD29.9 billion package for healthcare spending, municipality-level financial relief and the expansion of its social grant payment system. The third and final stage of the relief strategy was set to focus on infrastructure funding,¹⁴⁹ but the focus has since shifted to securing reliable electricity supply.



South Africa at a glance

Administrative division	Nine provinces; 278 municipalities, including eight metropolitan, 44 district, 226 local-level municipalities
Type of government	Parliamentary republic
Executive	President and Government Female Ministers - 48.3% ¹⁵⁰
Legislature	Bicameral parliament Parliament - 45.8% women ¹⁵¹
Judiciary	Constitutional Court of South Africa, Supreme Court, High Court
Political parties	Multi-party system since 1992 Ruling party: African National Congress, in power since 1994
Governance	Decentralised Republic with three levels of government: national, provincial and local
Voting system	Party-list proportional representation

¹⁴⁶ IMF (2021) ¹⁴⁷ IMF (2021) ¹⁴⁸ IMF (2021) ¹⁴⁹ IMF (2020) ¹⁵⁰ World Economic Forum (2021) ¹⁵¹ World Economic Forum (2021)

3.4 Structure and functions of government

South Africa, as a constitutional democracy, is divided into nine provinces, which vary considerably in size. The national, provincial and local levels of government all have legislative and executive authority in their own spheres.¹⁵² Each province has its own Legislature, Premier and Executive Council, which are defined as distinctive, interdependent and interrelated.¹⁵³ The country has three capitals: Cape Town the legislative capital; Pretoria, the administrative capital, and Bloemfontein the judicial capital.¹⁵⁴

Additionally, at the national and provincial level, South African traditional leaders inform advisory bodies. The 1996 Constitution states that the country should be run on a system of cooperative governance.¹⁵⁵

South Africa's formal political system coexists with a variety of local values and norms, where leadership focuses on hierarchy of authority. In these localities political authority is centralised, which allows chiefs and kings to intervene in social conflicts and influence an array of social issues.¹⁵⁶ The agenda of the national government to empower traditional leadership started shifting in 1998 when the White Paper on Local Government was published. Since then, consecutive governments have made

legislative attempts to give traditional leaders more power over land, particularly high-value land such as that proposed for mining activities.¹⁵⁷ This dynamic directly influences women's rights including land rights, be it inheritance or business-related land claims, requiring them to deal with both formal and traditional authorities.¹⁵⁸

In addition to the influence of traditional power, the country's formal legal order must interface with the values of indigenous customs. South Africa has adopted a range of laws, including the Recognition of Customary Marriages Act, the Reform of Customary Law of Succession and Regulation of Related Matters Act, the Communal Land Rights Act, and the Traditional Leadership and Governance Framework Act.¹⁵⁹ In addition, the Traditional Courts Bill, aimed at regulating traditional courts has been in discussion since 2008 and is currently on hold due to concerns over the legality of denying citizens the right to opt out of the traditional court process. This stipulation is particularly contentious for women's rights advocates given the male dominance of traditional courts. However, despite having limited formal jurisdiction and powers, customary courts continue to be the first point of call for the majority of the rural population, where they continue to hear and decide on cases related to marriage and inheritance and gender-based violence.¹⁶⁰

¹⁵² South African Government. (n.d.-e) ¹⁵³ South African Government. (n.d.-e) ¹⁵⁴ South African Government. (n.d.-e)

¹⁵⁵ Cooperative governance means that the three spheres of government (national, provincial and local) should work together (cooperate) to provide citizens with a comprehensive package of services. South African government. (n.d.-f) ¹⁵⁶ South African History Online (SAHO) (2016) ¹⁵⁷ South African Government. (n.d.) 2021/2022 Annual Performance Plan ¹⁵⁸ Ubink, J., & Duda, T. (2021)

¹⁵⁹ South African Government, Traditional Courts Bill (2017) ¹⁶⁰ Osman, F. (2021)



4. Barriers and enablers to women's economic empowerment in South Africa

This section of the report provides a detailed analysis of cross-cutting barriers and enablers to women's economic empowerment in South Africa. The findings are presented by each domain of the conceptual framework, beginning with structural factors before moving on to normative and individual factors affecting women in South Africa's economic empowerment opportunities and outcomes.

4.1 Structural factors

4.1.1 Legal and policy commitments

The South African Constitution protects the rights of all citizens, and promotes equal protection, benefit of the law, and freedom from unfair discrimination based on gender, sex, pregnancy and marital status. More specifically, gender equality is protected by South Africa's Promotion of Equality and Prevention of Unfair Discrimination Act of 2000, Employment Equity Act of 1998, Criminal Law (Sexual Offences and Related Matters) Act of 2007 and Domestic Violence Act of 1998.

The Department of Women, situated in the Office of the Presidency, works to ensure women's economic empowerment and gender equality are prioritised.¹⁶¹

This has been enabled through the multi-sector 2015-2020 Strategic Plan and National Gender Policy Framework for Women's Empowerment and Gender Equality (2016) that articulate constitutional, legislative and legal mandates associated with advanced socioeconomic gender empowerment. The Commission for Gender Equality,¹⁶² provided for in the Constitution, focuses on research, public education, policy development and legislation.¹⁶³

As a part of its Gender Responsive Budgeting (GRB) efforts, in 2019, the South African Cabinet approved and formalised the Gender Responsive Planning, Budgeting, Monitoring, Evaluation and Auditing Framework (GRPBMEAF). The objective was to advance ongoing work initiated by the International Monetary Fund (IMF) and give a clear mandate to the National Treasury to lead in this area. The original framework is positioned to go beyond simple gender allocations in ministerial and sector-specific budgets. It attempts to explicitly incorporate gender through adaptation and leveraging existing institutions and supportive tools. In 2021, the National Treasury collaborated with the IMF's Regional Technical Assistance Center for Southern Africa (AFRITAC South) and the Fiscal Affairs Department to develop a roadmap to roll out the GRPBMEAF.¹⁶⁴ The review highlighted the need for better data, monitoring and reporting systems of GRB efforts including service delivery efforts, as well as better integration of gender within spending reviews and processes to improve overall gender equality goals and budget allocations.¹⁶⁵

¹⁶¹ Department of Women, South Africa (n.d.) ¹⁶² The commission has been set up based on the Chapter Nine Institutions of the constitution. Chapter Nine Institutions refer to a group of organisations established in terms of Chapter 9 of the South African Constitution to guard democracy. ¹⁶³ Commission for Gender Equality (CGE) (n.d.) ¹⁶⁴ International Monetary Fund (2021) PFM blog (n.d.) ¹⁶⁵ International Monetary Fund (2021) PFM blog (n.d.)

At the international level, all major conventions on women's rights are ratified. These include the Convention on Elimination of All Forms of Discrimination Against Women (ratified in 1981), the Convention on the Rights of Child (ratified in 1991), and the Convention on the Rights of Persons with Disabilities (ratified in 2010).¹⁶⁶ More recently, the government has ratified the International Labour Organization (ILO)'s Convention on the Elimination of Violence and Harassment in the World of Work, which will come into force in November 2022.¹⁶⁷

4.1.2 Policy environment

South Africa has a complex policy framework designed to empower women and a significant social safety net programme.

The South African government has spearheaded efforts to advance women's economic empowerment through major policy and legislative efforts. The National Development Plan (NDP) 2030 includes a focus to expand public employment to provide jobs for unemployed women and youth.¹⁶⁸ It also suggests improving access to drinking water, electricity and quality early childhood education that would free women from unpaid work and help them seek jobs. In addition, it includes the launch of a pilot nutrition intervention programme for pregnant women

and provides free microbicides to girls aged 16 years and older. Other focus areas of the government for the next decade include HIV treatment and prevention, and securing tenure for communal farmers, especially women.¹⁶⁹

The government has also initiated a number of programmes aimed at women's economic empowerment in South Africa.

These include: (i) Technology for Women in Business (TWIB), to achieve business growth in women-led science and technology enterprises;¹⁷⁰ (ii) SEDA - Women Enterprise Coaching Program (WECOP), to provide skills and training support to women to develop their business and management competencies;¹⁷¹ and (iii) Isivande Women's Fund, to provide more affordable, usable and responsive finance than is currently available to women.¹⁷² Job creation initiatives, such as the Expanded Public Works Programme (EPWP), have been introduced in all provinces with the aim of employing a higher proportion of women (60%).¹⁷³ The programme has been criticised, however, for providing only temporary employment, limited training, limited opportunity for progressing into formal employment, and for being insufficiently responsive to the needs of marginalised women, in particular the poorest and Black African women.¹⁷⁴

¹⁶⁶ OHCHR (n.d.) UN Treaty Body Database (n.d.) ¹⁶⁷ Bowmans (n.d.) ¹⁶⁸ South Africa & National Planning Commission. (2012)

¹⁶⁹ South Africa & National Planning Commission. (2012) ¹⁷⁰ Western Cape Government (n.d.) ¹⁷¹ SEDA (n.d.)

¹⁷² South African Government. (n.d.-b) ¹⁷³ Republic of South Africa (2021) ¹⁷⁴ Parliamentary Monitoring Group (PMG) 2020

Furthermore, the government has voiced an intention to ensure that 40% of public procurement goes to women-owned businesses.¹⁷⁵ South Africa's Procurement Act contains a preferential procurement clause for women by legislating that 30% of all government procurement opportunities should be reserved for women-owned businesses (WOBs). In 2020, during a speech to mark International Women's day, South African President Ramaphosa pronounced that to promote women's economic opportunities, WOBs should have a 40% reserved share under the preferential procurement clause.¹⁷⁶ However, as at September 2021, neither the National Treasury nor the Office of the Chief Procurement Officer had made any follow-up plans or implemented any action to this effect.¹⁷⁷ A key challenge inherent in this delay is that public procuring entities cannot implement without approved guidelines.

In tandem, the country is focusing on youth entrepreneurship and employment. Initiatives and entities include the National Pathway Management Network (1.2 million youth), the National Youth Development Agency, and the Department of Small Business Development, which aimed to support 15,000 start-ups by 2024 (reduced to 10,000 to align with revised 2019/2024 medium-term strategic framework).¹⁷⁸ Central to these efforts will be the need for an effective action plan to tackle, head on, rampant corruption in the country's

public sector, first through the enforcement of governance in state-owned companies.¹⁷⁹ However, there is a lack of information available on whether and how young women are accessing and benefiting from these schemes.

Among the latest government initiatives is the launch of the 2021 Women Empowerment and Gender Equality (WEGE) Strategy aimed at ensuring women's active participation in the energy sector.¹⁸⁰ The strategy has a five-year implementation plan with specific deliverables. WEGE initiatives are divided into four areas: capacity development; organisational support; governance and institutional development; and economic growth and development. For example, recommended actions include developing partnerships with international organisations with focus on women. The strategy commits to carrying out a detailed study once every three years to measure and report on women's penetration and participation in the energy sector.¹⁸¹

While gender equality targets are included in national development plans and supportive policies, this has not yet translated into creation of permanent and secure employment opportunities. For example, the 2030 NDP fails to mention critical factors in its chapters that will affect

¹⁷⁵ South African Government (2020) ¹⁷⁶ Allen (2020) ¹⁷⁷ Williams-Elegbe (2021) ¹⁷⁸ Department of Small Business Development (2022)

¹⁷⁹ IMF (2020) ¹⁸⁰ Department: Mineral Resources and Energy, Department of South Africa (n.d.)

¹⁸¹ Department: Mineral Resources and Energy, Department of South Africa (n.d.)

the strength and achievability of the plan.¹⁸² For example, the chapter on the rural economy does not mention the role of women in rural economies and the critical factor of traditional leadership and governance (TLG) in a meaningful way that will establish the connection between the two. Ultimately, the NDP does not recognise the interface between women, rural development, and traditional leadership and governance, which may lead to complications in the implementation of the NDP unless it is clarified, refined, and asserted.¹⁸³

In addition to the mainstream economic empowerment measures, the government has taken several steps to address gender-based violence and harassment (GBVH) in the workplace. This includes the 2022 Code of Good Practice on the Prevention and Elimination of Harassment in the Workplace which provides guidance to employers and employees (in both formal and informal employment) on the elimination and prevention of harassment as a form of unfair discrimination in the workplace.¹⁸⁴ Furthermore, initiated in August 2020, the Amendment Bill to Criminal Law (Sexual Offences and Related Matters) Amendment Act 2007 recognises sexual intimidation as an official offence.¹⁸⁵ In February 2021, the President also launched a special Gender-Based Violence and Femicide (GBVF) Response Fund with ZAR128 million (USD8.8

million) pledged by the companies and organised business.¹⁸⁶ However, budgetary constraints and lack of cooperation among government departments have undermined the progress of the initiative.¹⁸⁷

At the legal level, South Africa performs well on laws for women's empowerment and gender equality. Laws promoting gender equality, such as labour laws, are largely in place. These laws have provisions on sexual harassment in the workplace,¹⁸⁸ equal pay for equal work, equal employment rights,¹⁸⁹ up to four paid months (120 days) maternity leave, and 14 days paternity leave,¹⁹⁰ equal inheritance and secure access to formal financial resources.

Relevant legal measures include the prohibition of dismissal of pregnant workers, prohibition of discrimination in access to credit and ensuring equal business registration access.¹⁹¹ Laws relevant for gender equality include the Promotion of Equality and Prevention of Unfair Discrimination Act 4 (2000)¹⁹² and the Criminal Law (Sexual Offences and Related Matters) Amendment Act 32 (2007).¹⁹³

Trade unions have ensured the adoption and entrenchment of basic employee rights, including the right to strike, and safeguarded workers by advocating for improved working conditions. Unions have also played an

¹⁸² Chilenga, T. J. (2017) ¹⁸³ Chilenga, T. J. (2017) ¹⁸⁴ Mather, N. (2022 -a) ¹⁸⁵ Mather, N. (2022 -a)
¹⁸⁶ South African Government (n.d.-c) ¹⁸⁷ Human Rights Watch (2021) ¹⁸⁸ Mather, N. (2022 -a) ¹⁸⁹ USB (n.d.)
¹⁹⁰ Claassen, A. (n.d.) ¹⁹¹ World Bank Women, Business and the Law (n.d.) ¹⁹² South African Government (n.d.)
¹⁹³ South African Government (n.d.-a)

instrumental role in securing the adoption of a minimum hourly wage (ZAR23.19 or USD1.47).¹⁹⁴

The government has put in place Broad-Based Black Economic Empowerment (BBBEE) policy, legislation and related Codes of Good Practice for companies to address racial inequalities.¹⁹⁵ However, significant work remains particularly to address the empowerment needs of Black and low-income South African women.

However, there is a lack of legal and regulatory frameworks targeting women in the informal sector. In particular, the South African Local Economic Development (LED) Network identified that there was a lack of legal and regulatory frameworks supporting the rights of informal domestic workers.¹⁹⁶ Furthermore, informal workers are largely excluded from national occupational health and safety laws,¹⁹⁷ and there remains very little social protection for women in the informal sector.

4.1.3 Selected non-governmental stakeholders supporting women

A 2019 mapping of women's rights organisations in South Africa, by the Women, Voice and Leadership Programme, identified 73 civil society organisations (CSOs), out of which 13 work at a national level, 27 cover multiple provinces and 33

are limited to a single province.¹⁹⁸ These organisations either had women as their primary focus, were working with men to effect change, or were mainstreaming gender into their operations. Of the surveyed organisations, 26 reported working on gender-based violence, 23 on leadership and mentorship, and 16 on women's economic empowerment.¹⁹⁹

4.2 Normative factors

4.2.1 Norms around paid and unpaid labour

Unpaid care work and gender-based violence impact women's employment decisions and prevent them from leveraging available resources for starting their own businesses

Women in South Africa are still disproportionately burdened with unpaid care work relative to men.²⁰⁰ While men spend most of their productive time on market work, women spend 71% of their productive time on household production at every age.²⁰¹ A recent secondary gender analysis of leisure time (using the 2010 time use survey) found that South African women have on average 37 minutes less leisure time per day than South African men, with negative implications for their productivity in terms of paid and unpaid work, and for their wellbeing. Interestingly, while the presence

¹⁹⁴ Mather, N. (2022-b) ¹⁹⁵ Department of Trade Industry and Competition (n.d.) ¹⁹⁶ Benjamin, N. (2017)

¹⁹⁷ Bamu-Chipunza, P. (2018) ¹⁹⁸ Women's Voice and Leadership South Africa (2019)

¹⁹⁹ Women's Voice and Leadership South Africa(2019) ²⁰⁰ Smith, C. (2019) ²⁰¹ Smith, C. (2019)

of children in the household decreases the leisure time of women, it increases the leisure time of men, highlighting gender inequalities in intra-household division of childcare.²⁰²

The disproportionate burden of unpaid care work for women is particularly prohibitive for entry into the formal sector, where working hours are less flexible.²⁰³ A study conducted by the University of Cape Town indicated that sharing the burden of unpaid care work could boost economic growth through the demographic dividend (i.e. increased workforce over the elderly population, which boosts economic activity and reduces the dependency ratio).²⁰⁴ Women's relative time poverty was exacerbated during the COVID-19 pandemic; a recent Women in Work study found that women's unpaid work stood at close to 7.7 hours per day in 2021.²⁰⁵

Gender norms continue to influence the type of roles deemed appropriate for women. For example, while 22% of computer science graduates are women, only 2.9% of them receive jobs in the field of technology.²⁰⁶ Gender norms and stereotypes also restrict women from taking on senior leadership roles in many sectors from academia to corporate leadership. Barriers for women include entrenched traditional attitudes to women in the workplace, gender-discriminatory workplace cultures and lack of

provisions or allowances for women's family and social roles (such as flexible working or sufficient childcare provisions).²⁰⁷

4.2.2 Voice, representation and leadership in decision-making

Women are increasingly represented in politics, although social factors continue to limit their decision-making power at home and in the workplace

Women are well represented in South African politics, despite the lack of legislated quotas for the Upper and Lower Houses of Parliament. Progress has been made in recent years, at both national and sub-national levels. Political parties such as the African National Congress and Economic Freedom Fighters have successfully introduced voluntary quotas of at least 50%.²⁰⁸ At the provincial level, women's representation increased from 30% to 43% after the 2019 elections, with Limpopo province having the largest proportion of women in its legislature at 53%.²⁰⁹ However, gender norms and stereotypes about women in leadership mean that women leaders continue to be perceived as weak leaders and not trustworthy by citizens at large.²¹⁰

South Africa has adopted legislative measures to promote gender-inclusive local government elections. Despite women

²⁰² Harrichurran, P., Vermaak, C., Muller, C., & UNU-WIDER. (2021) ²⁰³ Smith, C. (2019) ²⁰⁴ Smith, C. (2019) ²⁰⁵ PwC (2021) ²⁰⁶ SAIIA (n.d.) ²⁰⁷ Mwangi, D. N. (2020) ²⁰⁸ International IDEA. (n.d.) ²⁰⁹ Khumalo, S. (2019) ²¹⁰ Kanjere, M. (2019)

making up over half of voters, the number of female candidates is still under 50%. However, certain parties, such as African National Congress (ANC) and Economic Freedom Fighter (EFF), have adopted transformative policies that resulted in the increased participation of women into the local government.²¹¹

South Africa's trade unions have historically had high levels of female participation, as well as follow gender equality principles. For example, women made up 45% of the Congress of South African Trade Unions (COSATU)²¹² membership in 2011 and had a strong presence at union meetings and in shop floor leadership.²¹³ In 2018, COSATU elected its first female president and achieved 50/50 gender parity in its leadership structures.²¹⁴

A recent study of women leaders highlights how more women in leadership roles does not necessarily correlate with increased participation in decision-making processes. The study found that limited policy support, mentoring, peer networking and inflexible work arrangements hindered women leaders' participation, contributions and influence.²¹⁵

At the level of the household, women generally enjoy strong decision-making

status and actively engage in intra-household level decisions.²¹⁶ These are governed by demographic and socioeconomic factors such as age, marital status, level of education and income.²¹⁷ However, men continue to dominate decisions around employment income and opportunities.²¹⁸

4.2.3 Gender-based violence (GBV)

Gender-based violence constrains women's outcomes and is intrinsically linked to women's employment and earning potential, along with access to resources. South Africa is ranked 13th lowest in the Violence Against Women indicator by OECD²¹⁹ and fifth lowest in the Global Law and Order index by Gallup.²²⁰

Women are at risk of experiencing violence at home as well as in the workplace.

Estimates range from 20-50% of women reporting having experienced intimate partner violence (IPV) at some point in their lives.²²¹ Nearly 77% of women in South Africa have reported experiencing some form of workplace sexual harassment.²²² Many women may also not report an offence, especially if the perpetrator is someone close to them. This crisis is due in part to systemic failures in protecting victims, as acknowledged by South Africa's Minister of Justice and Constitutional Development, Ronald Lamola.²²³ The impact of the Domestic

²¹¹ Maziwisa, M. (2020) ²¹² COSATU - Congress of South African Trade Unions. (n.d.) ²¹³ Buhlungu, S., & Tshoaeidi, M. (Eds.). (2013) ²¹⁴ Mahlakoana, T. (2018) ²¹⁵ Mwangi, N. (2019) ²¹⁶ Guvuriro, S., & Booysen, F. (2021) ²¹⁷ Guvuriro, S., & Booysen, F. (2021) ²¹⁸ Guvuriro, S., & Booysen, F. (2021) ²¹⁹ Gallup Inc. (2019) ²²⁰ OECD (2019) ²²¹ Sere, Y., Roman, N. V., & Ruiter, R. A. C. (2021) ²²² Business Fights Poverty (2019) ²²³ Amnesty International (2021)

Violence Act (1998) has been limited due to lack of coordination, pervasive patriarchal values, inadequate support systems for victims and inadequate resources at courts.²²⁴

Deep-seated patriarchal norms are a significant driver of gender-based violence.

Men continue to be positioned as superior and tend to exert control over women's sexual expression and wellbeing. This in turn has resulted in negative health consequences for women, putting them at greater sexual risk including increased susceptibility to HIV/AIDS.²²⁵ This exclusion of women stems from the country's colonial past and apartheid, which have aided transactional sex, disrupted family structures and increased the spread of HIV/AIDs.²²⁶ Evidence also suggested that young men in particular are expected to meet high standards of "manhood" (such as providing for the family), which in turn contribute to high rates of crime and gender-based violence.²²⁷

Gender-based violence continues to curtail mobility by impacting women's ability to travel safely, particularly when dependent on public transport. Women from low-economic households may also be forced to travel further to access work opportunities, increasing their vulnerability towards gender-based violence.²²⁸ Given the unfamiliarity of markets, and distance from homes, women's ability to acquire goods for

sale, and networks may be hindered. Female migrants are additionally vulnerable, given their engagement in informal cross-border trade and undocumented status.²²⁹

Gender-transformative interventions engaging men and boys in South Africa show promise in preventing gender-based violence.

For example, the Stepping Stones and Creating Futures (SS-CF) intervention, which included a gender-transformative and livelihood-strengthening intervention with younger men (18-30 years old) in urban settlements, led to a significant reduction in women's experience of physical or sexual intimate partner violence, improvements in gender-equitable attitudes and less controlling behaviour by men.²³⁰

4.3 Individual factors

4.3.1 Human capital

South Africa has made significant progress in enabling girls' access to education since the mid-2000s, however racial discrimination continues to be pervasive in access to quality education. While gender parity in enrolment has been reached at primary and secondary levels, racial discrimination and inequality still persists, and continues to act as a point of disadvantage in girls being able to receive quality education.²³¹ Systemic inequality is prevalent in skewed enrolment, course

²²⁴ African Development Bank (AfDB) (2019) ²²⁵ Helman, R., & Ratele, K. (2016) ²²⁶ Kirkwood, D. (2018) ²²⁷ Kirkwood, D. (2018)

²²⁸ Porter, G., Murphy, E., Adamu, F., Dayil, P. B., De Lannoy, A., Han, S., Mansour, H., Dungey, C., Ahmad, H., Maskiti, B., S. C., & Van der Weidje, K. (2021) ²²⁹ International Labour Organization (2021) ²³⁰ Jewkes, R., Gibbs, A., Jama-Shai, N., Willan, S., Misselhorn, A., Mushinga, M., Washington, L., Mbatha, N., & Skiweyiya, Y. (2014) ²³¹ The Borgen Project (2018)

selection and limited career progression. Historical triple marginalisation of Black African women on the basis of class, race and sex has resulted in very few Black African women gaining access to higher education despite 70% of the country's population identifying as black.

Girls continue to lag behind their male peers in Science, Technology, Engineering and Medicine (STEM) subjects.²³² As

a response, affirmative action has been formalised to enable marginalised groups to access courses such as medicine and engineering through a quota system.²³³ An example of good practice includes the development of the Women in Technology Role Model database (South Africa) by AfChix. It is an Africa-based women in technology group that is creating and promoting a publicly-available database of female experts, role models, professionals, entrepreneurs and innovators. The aim is to ensure more women are recognised for their achievements and to break down social norms about women and girls in STEM subjects.²³⁴

Women entrepreneurs face a lack of access to skills and knowledge for starting a business.²³⁵ Financial, management, and accounting skills are crucial for growing a sustainable business. This concerns all areas of business: writing a business plan, defining

the target market, differentiating, pricing, marketing, and distributing the product.

4.3.2 Social capital

Women's lack of access to professional networks can hinder their economic opportunities. Research on women's leaders' experiences in South Africa found that women are directly or indirectly excluded from participating in male-orientated social clubs and activities, where much professional networking takes place.²³⁶ Common challenges facing women entrepreneurs include difficulties connecting to markets.²³⁷

In a diverse country such as South Africa, with high rates of migration, poor women are pushed to major cities to explore employment opportunities for themselves and their families. With social and economic structures favouring men, migrant women often remain marginalised and have severed ties with supportive kinship and social networks.²³⁸

4.3.3 Economic capital

Financial assets

More women than men have access to formal financial institutions in South Africa. Interestingly, South Africa is the only country in the region where more women (70%) own a bank account compared to men (68%).²³⁹ However, men are more likely

²³² UNICEF South Africa (2022) ²³³ Akala, B. (2019) ²³⁴ Kuroda, R., Lopez, M., Sasaki, J., & Settecase, M. (n.d.) ²³⁵ World Bank (2022) ²³⁶ Mwangi, N. (2020) ²³⁷ World Bank (2022) ²³⁸ Myroniuk, T. W. (2016) ²³⁹ World Bank (2022)

to use their account,²⁴⁰ possibly linked to the fact that women's high bank account ownership may be linked to women's higher rate of receipt of government subsidies and grants which require women to have a bank account.²⁴¹

Women are more likely to save informally and are less likely to have a pension or an investment account.²⁴² Women are also less likely than men to make mobile phone-enabled transactions. The gender difference in mobile-enabled transaction use in South Africa is as large as 4.4%.²⁴³

Limited access to capital or credit constrained women's ability to invest in, start, or expand their businesses. Only 8% of women compared to 11% of men borrowed money in the last year.²⁴⁴ Women continue to face multiple barriers to accessing formal credit including shortage of start-up capital and collateral, gender inequitable attitudes and lack of gender awareness of bank staff and financial institutions and lack of access to information.²⁴⁵ Consequently, women are more likely to access credit from non-bank financial institutions such as microfinance and savings and credit associations.²⁴⁶

Productive assets

A combination of customary and patriarchal norms continue to favour (white) male ownership. Approximately

72% of land is owned by White South Africans, while Black South Africans only own 4% and Indian South Africans approximately 5%. Men own twice as much land by hectare as women, and women are less likely to have land registered in their name.²⁴⁷ Despite positive legislation around women's land rights, women only own 13% of privately-owned farmland against a global average of 20%.²⁴⁸

As a response strategy, in mid-2019, the Presidential Advisory on Land Reform and Agriculture convened a committee to consider conditions of rural women's land rights oppression.²⁴⁹ It has been nationally acknowledged that rural women largely remain workers and not owners of land.²⁵⁰ While follow-up action and steps are in motion, it is still a long way to go before policy efforts start demonstrating the desired effects.

Domestic assets

Rural electrification in South Africa has resulted in reduced use of firewood as the main fuel for cooking. It has also reduced women's unpaid burden of fetching firewood.²⁵¹ Furthermore, community level electric water pumps have enabled reduction of travel time to well and nearby water bodies.²⁵²

²⁴⁰ FinMark Trust (2016) ²⁴¹ World Bank (2022) ²⁴² FinMark Trust 2016) ²⁴³ OECD (2018) ²⁴⁴ FinMark Trust (2016)

²⁴⁵ DWYPD (2019) ²⁴⁶ World Bank (2022) ²⁴⁷ DRDLR (2018) ²⁴⁸ Teagle, A. (2021) ²⁴⁹ Teagle, A. (2021) ²⁵⁰ Teagle, A. (2021)

²⁵¹ Dinkelmann, T. (2011) ²⁵² Clark, L. (2021)

Women in South Africa are increasingly getting access to digital technologies, although a digital gender gap persists. Just over half of all women (51%) regularly use the internet compared to 55% of men.²⁵³ Most women (83%) own a mobile phone compared to 89% of men.²⁵⁴

²⁵³ Washington Post (2020) ²⁵⁴ Gilbert, P. (2020)

5. Sector analysis briefs

The following briefs provide an overview of three broad sectors in South Africa: (i) the manufacturing sector (clothing, textiles, footwear and leather (CTFL)); (ii) the real estate sector (development/construction and property management/agency services); and (iii) the wholesale and retail trade (WRT) sector.

Each sector brief includes an overview of the gendered composition of jobs and the value chain, as well as analysis of barriers and enablers to women's economic empowerment within the sector. Finally, the briefs highlight key opportunities and entry points and sector-specific recommendations for both public and private stakeholders to improve women's economic opportunities within these sectors.

“An opportunity is to scale the cottage industries where people have natural talent. In the Western Cape, there is a natural affinity to design and to pattern making whether it’s through the craft side or textiles. It’s definitely one of our competitive advantages. This is where the Craft and Design Institute (CDI) made a massive impact; through skills development and business training programmes. Supporting someone, giving them training, assisting them with being market ready, scaling their product, pricing their product and teaching them how to export.”

Source: Government Stakeholder (Pathways Study Interviewee)

5.1 The manufacturing sector (clothing, textiles, footwear and leather (CTFL))



Sector overview

Clothing, textiles, footwear and leather (CTFL) accounts for 2.5% of total manufacturing output in South Africa. The CTFL value chain covers the production of synthetic and natural inputs through to the production of clothing and shoes.²⁵⁵ The sub-sector contributes 8% of manufacturing GDP and approximately 3% of total GDP.²⁵⁶

CTFL is the most labour-intensive manufacturing sub-sector in the country, although it largely remains low technology.²⁵⁷ The CTFL sub-sector is mostly concentrated in Gauteng, KwaZulu-Natal and Western Cape provinces, while the Eastern Cape province is increasingly becoming a clothing and textiles hub.²⁵⁸

The CTFL sub-sector has seen a decline in production in the last couple of decades.

The increase in cheaper imports has been a challenge for the previously well-established sub-sector, with many cut, make & trim (CMT) manufacturers having to close operations.²⁵⁹ Consequently, the majority of purchases (55%, or ZAR39 billion, approx. USD2.4 billion) are of imported products, rather than domestically-manufactured goods.²⁶⁰ Despite this, the CTFL sub-sector is still the largest in the SSA region in aggregate terms. Virtually all outputs are sold in the domestic market, though some South African retail chains have an international presence in the wider SSA region.²⁶¹ Household spending on clothing and footwear in South Africa is expected to increase by around 25% to ZAR125 billion (approx. USD7.7 billion) by 2025, with opportunities in the manufacturing of uniforms (school, military), workwear, wearing apparel including knits, protective clothing for hazardous industries, etc.²⁶²

²⁵⁵ DTI and InvestSA (2020) ²⁵⁶ South African Cotton Cluster (n.d.) ²⁵⁷ Morris, M., Barnes, J., & Kaplan, D. (2021)

²⁵⁸ DTI and InvestSA (2020) ²⁵⁹ IQOQO (2021) ²⁶⁰ Department of Trade, Industry and Competition (DTIC) (2020)

²⁶¹ World Bank Group (2016) ²⁶² Southern African Customs Union SACU (2022)

The South African government has committed to increasing the CTFL sub-sector's competitiveness. Government and industry stakeholders support the sub-sector through incentive programmes such as the Clothing & Textiles Competitiveness Programme (CTCP); Skills Development Support, and Value Chain Alignment (VCA).²⁶³ The government's Retail Clothing, Textiles, Footwear and Leather (R-CTFL) Master Plan sets out a number of objectives by 2030 and focuses on domestic and international market growth, value chain localisation and transformation, international competitiveness, as well as skills and technology advancement.²⁶⁴ In addition, the 2014 National Industrial Policy Framework sets out various strategic incentive schemes targeted at manufacturing and services sectors, while addressing cross-cutting and sector-specific constraints.²⁶⁵

There are around 4,500 registered CTFL manufacturers including mostly small and medium-sized enterprises (SMEs). The 20 largest companies control the majority (85%) of the market,²⁶⁶ while this varies by CTFL segment; in clothing, 29% of income is controlled by the top five suppliers, compared to 47% in footwear, 40% in textiles and 70% in leather.²⁶⁷ There are more clothing firms than textile manufacturers,²⁶⁸ with factories falling into

three main categories: (i) those producing regular clothing; (ii) factories manufacturing purpose-made clothes (such as uniforms and protective clothing); and (iii) factories acting as outsourced manufacturers for designers, known as CMT enterprises.²⁶⁹

“The challenge in the South African context is finding the synergies between design studios or competencies and the small manufacturers, big manufacturers and retail. I think the connections in the value chain are broken, although there have been attempts to try and fix this. Within it there would be lots of opportunities for women as this is an area that women have a preference for.”

Source: Interview with NGO Stakeholder (Pathways Study Interview)

The CTFL value chain includes unregistered firms working as informal suppliers. These vary in scale, scope and performance.²⁷⁰ They are often run by owners who used to work as formal sector skilled workers. These informal suppliers compete on price and work with design houses and larger apparel firms.²⁷¹

²⁶³ World Bank Group (2016) ²⁶⁴ Department of Trade, Industry and Competition (DTIC) (2020)

²⁶⁵ Department for Trade and Industry (2014) ²⁶⁶ DTI & InvestSA (2020) ²⁶⁷ TIPS (2017)

²⁶⁸ Department of Trade, Industry and Competition (DTIC) (2020)

²⁶⁹ Department of Trade, Industry and Competition (DTIC) (2020)

²⁷⁰ Although there is limited data on the total number of informal suppliers, levels of differentiation and workers employed.

²⁷¹ Morris, M., Barnes, J., & Kaplan, D. (2021)

Retailers are the largest companies in the value chain. Retailers import finished products as well as purchase items to sell from domestic manufacturers. Most local manufacturers sell directly to local retailers, although some run their own retail stores.

There are several active trade unions and employee associations in the sub-sector.²⁷² For example, the biggest union in the CTFL sub-sector, the Southern African Clothing and Textile Workers Union (SACTWU), negotiates wages and terms of conditions of employment for the majority of formally employed workers in the sub-sector.²⁷³ Other relevant actors supporting workers are professional associations, such as the National Clothing Retail Federation of South Africa (NCRF), the Textile Federation (TEXTFED), which represents five trade associations, and the Clean Clothes Campaign (CCC).²⁷⁴

Skills building in the sub-sector is supported by government agencies, universities and buyers. A key challenge for the CTFL sub-sector is to increase workers' skills to meet value chain Quick Response (QR)²⁷⁵ requirements. The public entity Fibre Processing & Manufacturing (FP&M) SETA collaborates with the Cape Peninsula University to provide workers in the Western Cape with training.²⁷⁶ Similarly, international buyers are already investing in supporting capacity of local suppliers or in building their own vertical capabilities for design, product development and manufacturing.²⁷⁷

From the stakeholder mapping exercise for the CTFL sub-sector, 78 stakeholders were identified across South Africa. A summary table of stakeholder types across the provinces is shown here, and the detailed information about stakeholders' activities (including women-focused provisions) can be accessed [here](#) on the Pathways Study website.

Stakeholder Type	Province			
	Kwazulu-Natal	Gauteng	Western Cape	National*
Associations, collectives, organisations, representative bodies	1	-	2	20
Private companies	9	-	4	10
NGOs/CSOs	-	-	2	4
Government agencies/departments	6	4	4	12
TOTAL	16	4	12	46

Note: *Sum includes global stakeholders, who are assumed to operate at a national scale

²⁷² ILO (2014) ²⁷³ FP&M SETA (2014) ²⁷⁴ FP&M SETA (2014) ²⁷⁵ Quick Response is an inventory management practice used in the apparel industry, put in place to increase responsiveness and flexibility to respond to volatile customer demand, and to reduce lead times (or the total times between manufacturing, storage and transport, and time in stores). Lipol, L. S. (2015)

²⁷⁶ Vika, L. (2016) ²⁷⁷ Morris, M., Barnes, J., & Kaplan, D. (2021)

The CTFL sub-sector employs over 200,000 people in both formal and informal manufacturing jobs. Formal employment in CTFL manufacturing is estimated at approximately 87,000 jobs (2019), of which half (44,700) are in clothing, 27,600 are in textiles, 9,100 are in footwear, and 5,300 are in leather manufacturing. The largest 20 clothing and shoe manufacturers employ between 500 and 3,000 workers, while most manufacturers employ fewer than 500 people.²⁷⁸ Including informal employment, it is estimated that the CTFL manufacturing sub-sector provides employment for 235,000 people. Approximately 120,000 people are employed in retail.²⁷⁹

The government's R-CTFL Master Plan aims to increase employment in the sub-sector to at least 121,000 net new jobs by 2030, including 70,000 in upstream²⁸⁰ formal manufacturing employment.²⁸¹ The total number of jobs in the sub-sector has slowly declined by about 2% a year, even when the sub-sector was reporting growth in production.²⁸² Between 2008 and 2017, the sub-sector lost approximately 40,000 formal jobs (from 280,000 to 240,000).²⁸³

Domestic production of CTFL faces a number of challenges. These include

competition from imports, increases in costs for manufacturers, quality and delivery pressures, outdated production processes and equipment, low performance from manufacturers, as well as lack of skills among workers.²⁸⁴ Furthermore, the COVID-19 pandemic and subsequent impact on workers has highlighted existing issues in the sub-sector, which range from low productivity and poor quality, to lack of social security and poor working conditions.²⁸⁵

The COVID-19 pandemic led to reduced demand, with lockdowns further causing supply chain disruptions and sales restrictions. Spending on clothing items decreased due to the economic impact of the pandemic.²⁸⁶ In addition, sales restrictions were implemented during the height of the pandemic, restricting sales to specific types of products, which affected sales of numerous clothing categories.²⁸⁷ Consequently, sales declined by 6.9% in 2020, the largest decline ever recorded. Supply chain disruptions have also been challenging for manufacturers, who have had to deal with delays, increased costs and reduced imports.²⁸⁸ Manufacturing of CTFL declined by about 15%, resulting in the majority of factories requesting COVID-19 relief assistance. A third of factories made workers redundant, affecting approximately 11,400 jobs.

²⁷⁸ TIPS (2017) ²⁷⁹ Statistics South Africa (2019) ²⁸⁰ Different stages within the supply chain are referred to as upstream or downstream. Upstream operations are those in which the materials flow into the organisation. Downstream operations are those in which materials (mostly in the form of finished products) flow away from the organisation to the customers. See <https://mfgtec.org/supply-chain-explained/#:~:text=Often%2C%20different%20stages%20within%20the,the%20organization%20to%20the%20customers>

²⁸¹ Department of Trade, Industry and Competition (DTIC) (2020) ²⁸² TIPS (2017) ²⁸³ TIPS (2017) ²⁸⁴ Department of Trade, Industry and Competition (DTIC) (2020) ²⁸⁵ ILO (2021) https://www.ilo.org/wcmsp5/groups/public/--africa/--ro-abidjan/documents/publication/wcms_820597.pdf ²⁸⁶ Smith, C. (2021) ²⁸⁷ BusinessTech (2020) ²⁸⁸ Smith, C. (2021)

Role of women in the CTFL value chain

In contrast to other manufacturing sub-sectors, the majority (71% in 2014)²⁸⁹ of workers in the CTFL manufacturing industry are women, including 82% of workers in clothing alone.²⁹⁰ These manufacturing jobs are concentrated in specific geographic areas²⁹¹ where few alternative opportunities exist.²⁹² Overall, almost a third (31%) of manufacturing workers are women, although men dominate in most other manufacturing sub-sectors. For example, only 17% of employees in metal manufacturing are women.²⁹³ Wages are lower in the female-dominated CTFL sub-sector than other male-dominated manufacturing sub-sectors.²⁹⁴

The majority of workers in the CTFL sub-sector are Black African. In 2015, three quarters (73%) of CTFL workers were African, compared to 67% in the manufacturing sector as a whole. In comparison, 5% of workers in CTFL were White (compared to 15% in other manufacturing sub-sectors).²⁹⁵ Women workers in the CTFL sub-sector are often single mothers and/or the sole breadwinner of their household.²⁹⁶

The majority of informal workers in the CTFL sub-sector are women. The sub-sector has largely informalised its labour force by subcontracting work to reduce costs. While formal employees are covered by legal protection and wage legislation, informal workers are not.²⁹⁷ Informal workers are often home-based workers, they are harder to track and protect. They generally work very long hours for lower pay than formal workers and without benefits.²⁹⁸ These informal jobs are also characterised by limited job security, as the work is order driven.²⁹⁹

Men are more likely to be enterprise owners, while women dominate in smaller businesses.³⁰⁰ Pathways Study interviewees suggest that while men still tend to hold much of the economic power in terms of owning medium and large formal businesses, the proportion of women-owned SMEs in the CTFL sub-sector is on the rise.³⁰¹

The CTFL sub-sector offers opportunities for women in leadership. The government's R-CTFL Master Plan aims to support the development of Black African and female senior management, as well as attracting investment for inclusion of Black-owned SMEs.³⁰²

²⁸⁹ Statistics South Africa (2014) ²⁹⁰ Statistics South Africa (2019) ²⁹¹ In towns such as Worcester, Caledon, Atlantis, Isithebe, Newcastle, Port Shepstone, Ladysmith, Phuthaditjhaba, Botshabelo, Babelegi, Zwelitsha, Hammanskraal, and Mogwase and around cities such as Durban, Cape Town and Pietermaritzburg. ²⁹² Vlok, E. (n.d.) ²⁹³ These are: furniture, other manufacturing and recycling; transport; transport equipment; telecommunication, medical and optical equipment and watches and clocks; electrical machinery and apparatus; metals, metal products machinery and equipment; glass and other non-metallic mineral products; coke, petroleum, chemical products, rubber and plastic; wood, wood products, paper, publishing and printing; food products and beverages. Statistics South Africa (2014)

²⁹⁴ Molapo, T. (2014) ²⁹⁵ TIPS (2017) ²⁹⁶ Vika, L. (2016) ²⁹⁷ ILO (2014) ²⁹⁸ Molapo, T. (2014)

²⁹⁹ Maraire, W. (2016) ³⁰⁰ Pathways study interview with sector stakeholder, agency

³⁰¹ Pathways study Interview with sector stakeholder ³⁰² Department of Trade, Industry and Competition (DTIC) (2020)

While limited information is available on total representation in managerial or supervisory positions, Pathways Study interviewees confirmed that women are represented in management in many factories. Furthermore, case studies of three clothing manufacturing firms in the Western Cape found that women were represented in the companies' management structures. However, in one of the firms examined, executive and top management roles were still held mostly by men.³⁰³

Factors affecting women's economic empowerment in the CTFL value chain

The following table summarises available data and evidence on key barriers and opportunities for women's economic empowerment in the CTFL value chain, with further detail on available evidence provided further below.

Summary of barriers to and opportunities for women's economic empowerment in the CTFL value chain

Barriers		
Structural	Normative	Individual
Weak and fragmented labour inspection undermines labour rights and working conditions	GBVH and IPV	Constrained educational attainment and skills levels
Limited legal protection for informal workers	Unpaid care and domestic work, especially childcare responsibilities	Limited business and marketing skills of SME owners
Low wages and limited job security (especially for informal workers)	Gender-based discrimination in the workplace	Limited access to financial support and social capital
Poor working conditions and health and safety risks	Supervisor's gender-inequitable attitudes	Inadequate provision of sexual reproductive and health rights (SRHR)
Poor remuneration in the face of rising costs of living		

³⁰³ Vika, L. (2016)

“A lot of women are operating outside of the formal economy. In order to enable women’s economic empowerment policies need to be designed specifically to empower women. And then data is required to measure changes over time.”

Source: Government Stakeholder (Pathways Study Interviewee)

Summary of barriers to and opportunities for women’s economic empowerment in the CTFL value chain

Opportunities and entry points

Structural	Normative	Individual
R-CTFL Master Plan’s objectives	Opportunities for women in leadership	Holistic skills building programmes delivered in workplaces
Strong labour laws including maternity leave	Standardised guidelines for businesses in the garment supply chains to address GBV and harassment	Improving access to financial capital and skills
Proudly South African (PSA) initiative	Work with leadership to change organisational cultures	Health care provisions
CCTC support in the workplace	Interventions aimed at reducing women’s unpaid care burden and redistribution of household care and domestic responsibilities	
Active unions and employee associations		

Structural factors

Labour rights in South Africa are set by the Constitution and specific laws and are implemented in a decentralised and well-documented system. The Constitution (1996) for example covers freedom of association. Other legislation, case law and codes of practice form part of South Africa's labour laws, which were enacted in the post-apartheid era. These include the Labour Relations Act 66 of 1995 (LRA), the Basic Conditions of Employment Act of 1997 [amended in 2002] (BCEA), the Employment Equity Act 55 of 1998 (EEA), the Unemployment Insurance Act 63 of 2001, Occupational Health and Safety Act 85 of 1993 and the Compensation for Occupational Injuries and Diseases Act 130 of 1993 (COID). Maternity rights are protected within South African legislation.³⁰⁴ South Africa has also ratified several ILO Conventions, however it has yet to ratify the ILO Violence and Harassment Convention 2019 (No. 190).³⁰⁵

The Proudly South African (PSA) initiative was set up by the National Economic Development and Labour Council (NEDLAC) to support local industry (including garment manufacturing) to establish standards on fair labour and environmental practices. Companies that sign up and meet the standards can display the campaign's logo. The labour standards are in line with the country's labour laws.³⁰⁶

In some cases, buying companies set up their own complaints procedures and codes of conduct for local suppliers with independent audits. These internal policies are generally compliant with labour laws and provide minimum standards for working conditions.³⁰⁷

However, the labour inspection system is under-resourced and fragmented. A mixed-methods research (2011), targeting workers in South Africa, Lesotho and Swaziland, found that in the three factories in South Africa, 47% of respondents (workers) were aware of labour codes that applied to them and how these could improve their working conditions. In the two factories where codes were in place, workers were not sure how to differentiate inspectors from buyers visiting the premises. In some cases, workers were aware of visits by the Department of Labour, who asked about wages and wage satisfaction, however nothing was done to respond to complaints.³⁰⁸ The LRA makes provision for dispute resolutions, however challenges with existing dispute mechanisms remain including the high number of disputes, low awareness among employers, and unsuitability of the conciliation mechanism.³⁰⁹

Consequently, there are significant implementation gaps between policies and practices. For example, one of South

³⁰⁴ Molapo, T. (2014) ³⁰⁵ Molapo, T. (2014) ³⁰⁶ Ascoly, N. (2006) ³⁰⁷ Molapo, T. (2014)

³⁰⁸ Bezuidenhout, A., & Jeppesen, S. (2011) ³⁰⁹ Molapo, T. (2014)

Africa's largest retail supplies, The Foschini Group (TFG), was recently ranked one of the weakest performing companies in the World Benchmarking Alliance's Gender Benchmark³¹⁰ - scoring a low 10.8 out of 100. Despite women being represented at all levels, including among senior executives and senior managers, the gender assessment found that the company lacks an overall commitment to gender equality and women's empowerment across its full value chain. The assessment highlighted a lack of gender-related targets, insufficient engagement with key stakeholders and employees on gender issues, lack of provision of childcare or other flexible working conditions, as well as a lack of evidence that The Foschini Group upholds workers' rights through its supply chain.³¹¹

As a result of these implementation gaps, women workers in the sub-sector experience poor working conditions and health and safety risks. Reported issues include poor demarcation of emergency exits; women being subjected to strip searches; insufficient toilet facilities, limited air, ventilation, heating or air conditioning and cramped working conditions.³¹² As a result of poor working conditions, many women workers reportedly experience hypertension, headaches, and back and shoulder pains.³¹³

Poor remuneration in the face of rapidly rising living costs has been identified

as a key challenge to women's economic empowerment in the clothing segment in Sub-Saharan Africa.³¹⁴ However, the segment has active unions representing workers and defending workers' rights. For example, in 2020, SACTWU settled a wage agreement for the garment industry, which will benefit 70,000 people.³¹⁵

Normative factors

The issue of gender-based violence and harassment (GBVH) in the clothing segment has received global attention.

In South Africa, evidence on gender-based violence and harassment in the CTFL sub-sector is limited. However, a Pathways Study interviewee highlighted women's feelings of safety and lack of sufficient GBV safeguarding policies as key challenges faced by women in the sub-sector.³¹⁶ Similarly, a report on the working conditions faced by women workers highlighted harassment by supervisors.³¹⁷ However further research is needed to assess prevalence and drivers of gender-based violence and harassment in the CTFL sub-sector in South Africa.

Given high rates of gender-based violence nationally, many women workers are also likely to experience other forms of gender-based violence including intimate partner violence at home. While studies on workers in the CTFL sub-sector's experiences of intimate partner violence are limited, in

³¹⁰ An assessment of 35 global companies from the clothing segment on their efforts to drive gender equality and women's empowerment across their entire value chain. ³¹¹ World Benchmarking Alliance (2020) ³¹² Molapo, T. (2014) Deedat, H. (2022) ³¹³ Deedat, H. (2022) ³¹⁴ BSR (2017) ³¹⁵ IndustriAll (2020) ³¹⁶ Pathways study interview with an economist, specialising in developing policies aimed at broadening economic participation ³¹⁷ Deedat, H. (2022)

South Africa, according to the most recent prevalence data from the 2016 DHS, over one in five women aged 18–50 years, have experienced physical or sexual violence by an intimate partner in their lifetime (see section 3.2).

Women factory workers in the sub-sector also face gender-based discrimination.

For example, pregnant women fear losing their jobs (after childbirth) and report poor working conditions including stretch breaks/walks being frowned upon by supervisors/management.³¹⁸ Furthermore, a 2017 study found that regionally, difficulty balancing work and care duties, especially childcare is one of the main issues affecting women’s economic empowerment in the apparel industry.³¹⁹

Work with leadership to shift attitudes can improve the gender-responsiveness of workplaces. The Cape Clothing and Textile Cluster (CCTC) is a not-for-profit initiative set up jointly in 2005 by government and industry, and supports the sector in the Western Cape.³²⁰ A 2016 study found that by working with leadership to improve attitudes and knowledge, the initiative has improved the gender-sensitivity of the workplace and overall working conditions.³²¹

Individual factors

The majority (64%) of CTFL workers have limited educational qualifications and most are unskilled when they enter this sub-sector. Only 5% of workers have a post-secondary qualification (compared to 10% in other manufacturing sub-sectors).³²² New entrants in the sub-sector often have low skills, and there are primarily young women with up to Grade 12 qualifications. Even though some firms have started investing in training (including in management), skills development is still a need across the sub-sector.³²³

There is limited data on women’s cooperative membership in the sub-sector. While women’s cooperatives have the potential to expand women’s economic opportunities, a Pathways Study interviewee highlighted how a lack of diversified technical skills and business skills of women in women’s cooperatives in the CTFL sub-sector limited profits. Furthermore, a lack of access to distribution channels can hinder smaller women-led SMEs.³²⁴

A lack of access to capital can hinder women entrepreneurs in the sub-sector. For example, capital for cash flow, equipment and premises, as well as skills to be able to cost and market products were highlighted as individual-level constraints by a Pathways Study interviewee (sector stakeholder).

³¹⁸ Deedat, H. (2022) ³¹⁹ BSR (2017) ³²⁰ Cape Clothing and Textile Cluster CCTC (n.d.) ³²¹ Vika, L. (2016)
³²² TIPS (2017) ³²³ Vika, L. (2016) ³²⁴ Pathways study interview with private sector representative.

“There are plenty of opportunities in terms of entrepreneurship. However, everyone seems to focus on the same things. Many women’s cooperatives focus on uniforms, for example shirts and trousers. There are opportunities to diversify within uniforms into items such as socks, knitwear and to diversify outside of uniforms. Next to that there is also a lack in business skills. For example, many women know how to sew from someone who taught them or gave them an old machine, but they don’t know how to expand a business. They don’t have the skills to set up a line, set up a floor, to manage a growing business. Neither do they have a platform to market or distribute their products.

Source: Private Company (Pathways Study Interviewee)

However, many companies offer training opportunities. Among learners who interacted with the Fibre Processing & Manufacturing (FP&M) SETA (a skills building public entity) in 2011 to 2013, the majority were women (72%) and Black African workers (74%). Over half (62%) of these learners were unemployed at the time. Women were overrepresented in all segments, except leather, where 57% of learners were male.³²⁵ Pathways Study interviewees further highlighted the numerous upskilling opportunities for female employees and career development opportunities in the formal sector. However, lack of confidence and negotiating skills was mentioned as a barrier faced by many women, highlighting the need for WEE-focused initiatives to focus on both hard and soft skills.³²⁶

Qualitative research found that some local factories provide health care and health education, as a means to boost productivity and reduce absenteeism.

Health care is largely provided by external providers or health care professional visits.³²⁷

“There is absolutely a career path for women. The occupations in high demand in the sector are aligned to women - the pattern maker, the fashion designer, supervisors, team leaders and other management positions. Through skills development grants FP&M SETA are able to support women from being a factory hand to becoming a team leader or supervisor. And they could progress to run their own businesses or domestic businesses.”

Source: Government Stakeholder (Pathways Study Interviewee)

³²⁵ FP&M SETA (2014) ³²⁶ Pathways study interview with key stakeholders, private companies

³²⁷ Vika, L. (2016)

Recommendations

1. Strengthen the CTFL sub-sector's commitments to gender equality

Recommended strategies include:

- Work with the government to improve implementation of policies and laws in relation to labour rights and decent work within the CTFL sub-sector, including extending labour rights and regulations to the sub-sector's largely informal employment base.
- Advocate for ratification of the ILO Violence and Harassment Convention (No. 190).
- Work with the government to support gender-responsive post-pandemic recovery efforts targeted at the CTFL sub-sector to build better resilience to future shocks. This should include extending labour rights to informal workers, a regulatory framework which incentivises formalisation of the workforce, and market-orientated skills building programmes targeted at women.
- Work with key international and domestic buyers and sector associations to raise gender-related standards, for example by leveraging the Clean Clothes Campaign and other gender benchmarking initiatives such as the World Benchmarking Alliance's Gender Benchmark.
- Targeted efforts to build political will such as commissioning and disseminating research on the economic impact of gender-related challenges in the sub-sector such as the impact of gender-based violence and harassment on productivity and absenteeism.
- Build on and expand initiatives such as the ILO and World Bank's "Better Work" initiative,³²⁸ to improve working conditions for women in the value chain and that promote mutual accountability and transparency in the sub-sector, involving government regulators, brands, factories, workers and consumers. Such sub-sector-wide initiatives should include assessments, training, advocacy and research designed to improve gender-related policies, attitudes and well as behaviours. Use and disseminate results of the work to influence and improve government policies and regulation of the sub-sector, including inclusion of gender-related targets within sector-specific plans and monitoring and accountability systems.
- Work with unions including SACTWU and employee associations to enable meaningful engagement of women workers in any agreement, and work with them to advocate for improvements in wage standards and benefits, for example a minimum living wage for the sub-sector, and improvement in provisions for informal workers.

³²⁸ <https://betterwork.org/>

2. Work with employers to promote gender-sensitive and safe workplaces

Recommended strategies include:

- Leverage existing international standards and benchmarks such as the World Benchmarking Alliance’s Gender Benchmark to incentivise companies to improve its commitments on gender.
- Support employers to undertake gender-based assessments and develop gender-related targets and plans. Facilitate effective engagement with employees and key stakeholders on gender issues, and work with employers to adopt gender-sensitive policies and provisions ensuring non-discriminatory recruitment and promotion practices, allowing flexible work arrangements, offering extended maternity and paternity leave, enforcing sexual harassment disciplinary processes, ensuring gender-equal remuneration and safe and affordable transport.
- Work with CTFL employers to adapt and roll out CARE’s GBVH guidelines for businesses in the South African context to address gender-based violence and harassment in garment supply chains (See case study below).
- Work with employers to strengthen GBVH “no-tolerance” policies, communication, enforcement, and accountability mechanisms. Couple efforts to improve policies with awareness-raising and educational campaigns in the workplace and local communities (for example, to address the issue of harassment experienced on the way to work).

Case Study - CARE GBVH Guidelines

CARE and Better Factories Cambodia developed standardised guidance for businesses in garment supply chains, to address gender-based violence and harassment.

The guidelines focus on five areas: human resource management; procurement, purchasing and sourcing; supply chain management; client and customer management; and subsidiary management.

The tool provides guidance on organisational leadership, workplace policies, systems, normal and practices, and training, and is targeted to supply chain stakeholders: brands, retailers, licensors, licensees, agents, manufacturing groups and factories, as well as governments, employer and industry associations, trade unions and non-profit organisations.

Source: <https://www.care.org/our-work/education-and-work/dignified-work/preventing-violence-and-harassment-at-work/standardized-guidance-for-addressing-harassment-in-the-garment-industry/>

²⁷⁸ Jost et al. (2016) in Manfre and Laytham (2017) ²⁷⁹ FAO (2011) ²⁸⁰ Farm Africa (2020) ²⁸¹ Uganda (2017) ²⁸² Farm Africa (2020)
²⁸³ Farm Africa (2020) ²⁸⁴ Chang (2010), in AfDB (2016) ²⁸⁵ Chang (2010), in AfDB (2016) ²⁸⁶ Kajubu (2017, March 2017)

- Through monitoring and spot checks, ensure that health and safety processes are in place, and that there is a focus on ensuring awareness of safety practices among workers.
- Sponsor and support women-led informal CTFL firms to formally register and provide women entrepreneurs with skills in financial literacy and management, business development, networking and mentoring opportunities.

3. Design and implement holistic skills building and vocational training to improve women's opportunities in the CTFL sub-sector

Recommended strategies include:

- International and local NGOs can build on the experience of initiatives in other regions (such as CARE International's work with garment factory workers in Asia and Latin America) to work with South African companies to deliver factory-based holistic gender interventions using financial skills and SRHR as an entry point to tackle other issues affecting women's lives including links to GBV referrals and services.
- Focus on leadership skills and career progression opportunities, work alongside companies to promote hiring of women in management and senior leadership, internships, leadership programmes, and mentoring and networking opportunities.

- Support initiatives that link skilled candidates to job opportunities, improve initiatives' work by providing incentives such as "awards for results" and monitoring of gender targets and number of people obtaining jobs.
- Support holistic training programmes focusing on both hard and soft skills development for women entrepreneurs in the sub-sector.
- Design and implement training or other initiatives to support women workers' agency and awareness of labour rights. This can be done in partnership with unions and collective actors.

4. Address research gaps and build evidence of what works

Recommended strategies include:

- Commission and undertake research on women's working conditions and broader needs in the CTFL sub-sector. This should include research on the prevalence and dynamics of gender-based violence and harassment in the CTFL sub-sector to inform advocacy and programming.
- Commission and undertake research with marginalised groups (such as Black African women, single mothers, and women with disabilities) to understand different barriers and challenges and to design inclusive interventions.

²⁸⁷ Farm Africa (2020) ²⁸⁸ Government of USA (2013) ²⁸⁹ Selhausen (2015) ²⁹⁰ Various sources in Ochago (2017)

²⁹¹ Meemken, Veettill and Qaim (2017) in ICO (2018) ²⁹² Ochago (2017) ²⁹³ Sekabira; Qaim (2017) in ICO (2018)

²⁹⁴ Meemken, Veettill and Qaim (2017) in ICO (2018)

- Evaluate interventions and include outcomes and indicators related to women’s economic empowerment as well as related outcomes linked to experience of gender-based violence and sexual and reproductive health to provide an accurate picture of the impact on any intervention on women’s lives.
- Ensure meaningful participation of women in the design of all WEE interventions, including through participatory methods.



5.2 Real estate sector (development/construction and property management/agency services)

Sector overview

Real estate comprises real estate development/construction, property management and real estate agency services. Real estate agency services encompasses sales and rental activities across the segments of land ownership, residential housing, office space, retail space and industrial zones. These are property stakeholders offering a range of services including sales, lettings and property management.

“Gauteng, Cape Town and Durban together make up 76% of the value of the property sector because this is where all the business happens.”

Source: Government Stakeholder (Pathways Study Interviewee)

The South African property market size was valued at ZAR5.8 trillion in 2016

(**approx. USD361 billion**). This includes commercial property (retail, office, industrial and hotels), residential, undeveloped land zones and public sector real estate. Residential property accounts for almost three quarters of the sector’s value,³²⁹ while residential construction and rental constitutes 2% of GVA (2016).³³⁰

Development/Construction

The construction sub-sector accounted for about 4% of GDP (2019), although the sub-sector has been underperforming in the last decade due to declining investment.³³¹ The industry operates in a project specific environment and combines investors, clients, contractors and consultants.³³²

³²⁹ PropertyWheel_GLP. (2017) ³³⁰ Center for Affordable Housing Finance in Africa (2019)

³³¹ Research and Markets (2021) ³³² Marx (2012: 2). Dlamini, G., Shakantu, W., & Kajimo-Shakantu, K. (n.d.)

The construction sub-sector employs over 1.3 million people,³³³ or 8% of the total labour force,³³⁴ with most workers engaged in informal employment.³³⁵ For example, in housing construction, over 300,000 people were employed in 2016, with about two thirds (67%) of workers in informal jobs. A quarter of workers were formal unskilled employees, and only 8% were skilled or highly skilled formal workers.³³⁶

Property Management/Agency Services

The informal rental market is growing rapidly and is often the only choice of housing for vulnerable populations, such as migrants, informal workers and female-headed households. These are cases where homeowners convert and rent a portion of their own dwelling, operating outside the regulatory framework. The size of this market is unknown,³³⁷ although it is estimated that 25% of South African households (3.6 million) live in rented accommodation.³³⁸

Employment in the housing rental market is relatively more stable than employment in housing construction. The rental market supported over 150,000 workers in 2016, with the majority (84%) of these formally employed. Over two thirds of employment opportunities in the rental market are for skilled or semi-skilled workers.³³⁹

A number of stakeholders operate in the real estate sector, and these include organisations specifically supporting women in the sector, such as Women's Property Network (WPN),³⁴⁰ the South African Women in Construction (SAWIC),³⁴¹ or the National Construction Incubator (NCI).³⁴² Other property market stakeholders include the Construction Industry Development Board,³⁴³ financial providers, estate agents and specialist attorneys (conveyancers and notaries). The real estate industry is regulated by the Property Practitioner's Act (2019).³⁴⁴

Stakeholder Type	Province				
	Kwazulu-Natal	Gauteng	Western Cape	Eastern Cape	National*
Associations, collectives, organisations, representative bodies	-	1	1	1	11
Private companies	1	2	-	2	25
NGOs/CSOs	-	1	1	-	7
Government agencies/departments	3	2	1	-	13
TOTAL	4	6	3	3	56

Note: *National stakeholder tally includes global stakeholders, who are assumed to operate at a national scale

³³³ Research and Markets (2021) ³³⁴ Veitch, C. (2019) ³³⁵ Center for Affordable Housing Finance in Africa (2019)

³³⁶ Center for Affordable Housing Finance in Africa (2019) ³³⁷ Scheba, A., & Turok, I. (2020) ³³⁸ Center for Affordable Housing Finance in Africa (2019) ³³⁹ Center for Affordable Housing Finance in Africa (2019) ³⁴⁰ SA Commercial Prop News. (2016)

³⁴¹ Shall, S. (n.d.) ³⁴² 3SMedia (2020) ³⁴³ CIDB (2021a) ³⁴⁴ ICLG (n.d.)

From the stakeholder mapping exercise for the real estate sector, 72 stakeholders were identified across South Africa. A summary table of stakeholder types across the provinces is shown here, and the detailed information about stakeholders' activities (including women-focused provisions) can be accessed [here](#) on the Pathways Study website.

The sector suffered losses during the COVID-19 pandemic. As the construction industry was not classified as essential except for urgent maintenance, work on sites was suspended during periods of COVID-19-related national lockdown. Projects have since resumed operations.³⁴⁵ Approximately, 111,000 additional annual job losses were reported in the sub-sector in the second half of 2020 (June 2020 compared with June 2019).³⁴⁶ Pathways Study interviewees further suggest that the pandemic has negatively impacted the number of new opportunities as few companies are currently hiring.³⁴⁷

Role of women

Development/Construction

The construction sub-sector is largely male dominated, with eight times as many men than women employed.³⁴⁸ Although the majority of employees (88% of almost 1.4 million people) are men, women's representation in construction has increased by 60% in the last decade.³⁴⁹ Only 8% of women work in managerial roles.³⁵⁰ Just under half (48%) of construction enterprises are women-led. However these are mostly very small enterprises.³⁵¹

This domination by males implies that women are excluded from key real estate decisions including urban planning and development, which invariably results in challenges for women and girls. A World Bank report described these challenges as “ranging from transportation services that prioritise commuting over caregiving, to the lack of lighting and toilets in public spaces”, and further noted that “these issues stem largely from the absence of women, girls, and sexual

“There are certain areas in real estate, especially the service space, that have been historically dominated by women. However if you're higher up the ladder, you'll start seeing that the number of women is shrinking significantly. Especially women representation in property funds/development/asset managers is low, particularly in leadership roles (+- 95% is “male and pale”).”

Source: Representative, Professional Association (Pathways Study Interviewee)

³⁴⁵ Research and Markets (2021) ³⁴⁶ Statistics South Africa (2020, October 15)

³⁴⁷ Pathways study interview with private sector representative ³⁴⁸ DWYPD (2019) ³⁴⁹ Sefolo, O. (2018)

³⁵⁰ Moodley, M. S. (2012)

³⁵¹ CDC (2020)

and gender minorities in planning and design decisions, leading to assumptions around their needs and the encoding of traditional gender roles within the built environment”.³⁵²

“Women are highly represented in the real estate agent space, but not enough in leadership positions within this profession. Lew Geffen Sotheby’s is the only big real estate agency company with a female leader. This needs to change.”

Source: Private Company (Pathways Study Interviewee)

Property Management/Agency Services

Key roles in property management/agency services are largely dominated by men, particularly leadership/ management roles and commercial real estate. For example, only one of the real estate investment trust (REIT) companies is led by a woman (out of about 30 companies).³⁵³ Similarly, fewer than 10% of REIT are Black-owned.³⁵⁴ Several Pathways Study interviewees noted that there is lower representation of women and in particular Black African women in asset management or funds, as well as in higher management positions.³⁵⁵

Case Study – Violence Prevention through Urban Upgrading (VPUU) programme

- In Khayelitsha, an informal settlement in Cape Town, South Africa, the Violence Prevention through Urban Upgrading (VPUU) programme undertook a street improvement project to provide a safe pedestrian route for women.
- Through participatory design and development with local leadership and municipal departments, a high-crime area was transformed into a sustainable, multifunctional public space.
- Women were involved in project design and implementation, as well as engaged in the project’s long-term sustainability through maintenance opportunities.
- Strategies such as tree planting, high-quality overhead lighting and easy-to-maintain materials have led to a 30% increase in pedestrian activity.

Source: Welle et al. (2015) in World Bank (2020) <https://www.worldbank.org/en/topic/urbandevelopment/publication/handbook-for-gender-inclusive-urban-planning-and-design>

³⁵² World Bank (2020) ³⁵³ Mayisela, N. (2020) ³⁵⁴ Property Wheel_GLP (2017)

³⁵⁵ Pathways study interviews with sector stakeholders

Women are employed in property management/agency services, although mostly in lower paid and lower skilled roles. For example, among the employees of Leadhome Properties, nearly half (48%) of real estate agents and most property advisors (70%) are women.³⁵⁶ According to a Pathways Study interviewee, women dominate in residential real estate, although mostly in administrative and lower-level roles, while men dominate in commercial real estate.³⁵⁷ Pathways Study interviewees suggest that women are less likely than men to be entrepreneurs in the real estate sector, as a number of barriers to entry (including financial and social capital) drive women to enter the sector as employees of existing companies rather than as entrepreneurs (these barriers are discussed further in the section below).³⁵⁸

Factors affecting women's economic empowerment in the real estate value chain

The following table summarises available data and evidence on key barriers and opportunities for women's economic empowerment in the real estate value chain, with further detail on available evidence provided further below.

³⁵⁶ Leadhome (2021) ³⁵⁷ Pathways study interview with sector stakeholder, government representative

³⁵⁸ Pathways study interviews with sector stakeholders

Summary of barriers to and opportunities for women's economic empowerment in the real estate value chain

Barriers		
Structural	Normative	Individual
Labour rights and benefits do not extend to temporary workers	Property development and construction is seen as men's domain, while women are concentrated in property services	Lower access to technical skills training
Wage system in property management is discriminatory	Women and (especially Black African women) are less represented at higher level	Barriers to entrepreneurship: access to capital, professional networks and skills
Minimal provisions of social amenities on construction sites and health and safety concerns	Women's contribution in construction is undervalued	Land ownership inequalities.
White dominated management structures	Lack of role models	Lack of awareness of relevant schemes and lack of linkage to job opportunities for trainees
Gender pay gap	Gender-based discrimination	Limited access to finance and capital
	Women and girls are not encouraged to study relevant subjects	
	Women's work burden is exacerbated by both the need to work harder to prove worth at work (in construction) and unpaid care	
	Risks of gender-based violence and harassment	

Summary of barriers to and opportunities for women's economic empowerment in the real estate value chain

Opportunities and Entry Points

Structural	Normative	Individual
<p>Labour rights and related legislation</p> <p>Government laws and policies promoting representation in employment and procurement</p> <p>Basic entry salary for new recruits in property management</p>	<p>Flexible working conditions offered by real estate</p>	<p>Stakeholders supporting women's visibility and access to training and networks in the real estate sector</p> <p>Internships and educational subsidies</p> <p>Linking students with job opportunities</p>

³²⁴ This approach entails extension workers engaging all members of the household including women and youth. The policy notes that costs for this activity cover establishment of nurseries, youth mobilisation and training. UCDA (2015)

³²⁵ IWCA (2019a) ³²⁶ Ministry of Agriculture, Animal Industry and Fishing (2016)

Structural factors

Pathways Study key interviewees indicated that the government has taken a prominent role in driving gender diversity in the real estate sector.³⁵⁹ The Departments of Human Settlements and Public Works have focused on women's empowerment strategies in procurement. For example, the Western Cape Department has allocated 50% of the Human Settlement Development Grant (HSDG) to contractors with Historically Disadvantaged Individual (HDI) status and enterprises with women and youth representation. The department has also partnered with South African Women in Construction (SAWIC) to encourage women to enter the construction industry.³⁶⁰ Similar strategies are also included in The KwaZulu Natal Department's strategy.³⁶¹ The National Departments of Housing and Public Works have set targets for women participation.³⁶²

Development/Construction

Although construction employment is highly regulated under South African legislation, temporary workers are not entitled to all benefits. Legal provisions regulate working conditions, wage, leave and benefits. The average construction worker works 45 hours a week, and full-time employees get 15 days of annual leave per 12 calendar months, as well as sick leave allowance. Maternity leave is provided following a continuous work period of two years. However, temporary workers are generally only entitled to unpaid sick leave.³⁶³

Section 43 of the Occupational Health and Safety Act 19 (Act No 85 of 1993) legislates provision of safe and hospitable workplaces. However, construction sites are characterised by minimal provisions of social amenities.³⁶⁴ National statistics (2014, 2015 and 2016) show an increase of fatalities and disabling injuries in the construction

“There is no fixed salary so as long as you don't sell any property, you get no income; if you need money fast, real estate is not the best choice; but if you can wait for a little while, real estate is a perfect career. However, there are currently conversations going on about giving beginning real estate agents an entry salary, at least for the first 3-6 months, to help them get on their feet; this has been a suggestion from REBOSA. Nothing is carved in stone yet but this would be very helpful as a new policy/legislation. This will encourage young females to enter or remain in the business because they will have more financial security.”

Source: Private Company (Pathways Study Interviewee)

³⁵⁹ Pathways study interview with sector stakeholders ³⁶⁰ Western Cape Government (n.d.)

³⁶¹ KwaZulu-Natal Department of Human Settlements and Public Works (2020) ³⁶² Moodley, M. S. (2012)

³⁶³ Melton, C. (2021) ³⁶⁴ Melton, C. (2021)

“When you sell a house it takes three months before you will see any money in your bank account and if you do not have someone to financially support you during that time or you don’t have saving, it may be difficult to survive in the profession. If you have no money in the bank, no fallback, then it’s difficult to start a career as agent. You have to have some kind of a buffer, either a parent that will provide for you or a husband that will provide for you, or some money in the bank.”

Source: Pathways Study Interview with Private Company

sub-sector, although there were marginal decreases in the number of accidents.³⁶⁵ There is reportedly no uniformity of health and safety management programmes and practices among industry employers.³⁶⁶

Property Management/Agency Services

A key structural barrier in property management relates to wage systems. Jobs in real estate property management do not come with fixed salaries, but are based on commission, which is paid several months after the property sale.³⁶⁷ A Pathways Study interviewee explained how this disadvantaged single women and those from lower-income households, as it is typical for employees to have to wait up to six months for their first sale and respective commission. They explained that one possible solution could be provision of a basic entry salary for new recruits to offer women in particular increased financial security.³⁶⁸

Normative factors

Development/Construction

Gender norms and stereotypes limit women’s opportunities in the real estate sector. The construction sub-sector has been historically male dominated and seen as a male domain.³⁶⁹ According to Pathways Study interviewees, this is primarily because women are perceived as less suitable for positions that require higher levels of physical labour and/or technical skills. In contrast, the property management and agency services sub-sectors are seen as more appropriate workplaces for women.³⁷⁰ The perception of construction as a male domain further deters women from entering the profession. Over a third (43%) of women in the sub-sector in one survey agreed that many women are intimidated by the fact that construction is male dominated.³⁷¹

³⁶⁵ Okonkwo, N. P. (2019) ³⁶⁶ Okonkwo, N. P. (2019) ³⁶⁷ DWYPD (2019)

³⁶⁸ Pathways Study interview with a private sector representative ³⁶⁹ Agherdien & Smallwood (2017)

³⁷⁰ Pathways study interview with private company ³⁷¹ Moodley, M. (2012)

“I think role models are important. Role models play a huge role in a teenagers deciding on what they want to become, and in professions such as architecture and surveying there aren't that many women role models. Because there aren't that many female role models in the more technical roles in real estate, young females are not really drawn towards these professions. There are a lot of female role models in real estate who are doing really well in the agency/admin spaces, which partially explains why women are drawn towards these professions.”

Source: Private Company (Pathways Study Interviewee)

Women are undervalued in the construction industry. Three different studies found that women's work in the industry is not valued the same as men.³⁷² For example, a mixed-methods study targeted at women in construction found that 70% of respondents thought that women in the industry do not get the same level of respect as men.³⁷³

Gender norms and stereotypes impact on girls' and young women's choice of education and training. In general, girls are not encouraged to pursue real estate-relevant subjects.³⁷⁴ A Pathways Study interviewee explained that gender discrimination and bias exist in relation to enrolment in courses such as architecture and engineering. These are deemed less suitable for women.³⁷⁵ Similarly, a lack of female role models in higher paying and senior roles in the sector influences young women's choice of profession.³⁷⁶

Perceptions of gender discrimination discourage women from joining the construction industry. A study of drivers for women entering the construction industry similarly found that gender-based discrimination, lack of role models, evidence of sexual harassment and harsh work environment were all factors discouraging women from joining the industry. Respondents believed that discrimination was more likely to happen on construction sites, rather than in consultancy roles. Over half of respondents (64.7%) believed that women did not have the same opportunities to progress in their careers.³⁷⁷

Property Management/Agency Services

Racial discrimination affects Black African women's (and men's) opportunities in the sub-sector. For example, as a Pathways Study interviewee explained, internships are a prerequisite to becoming a real estate agent, and due to discrimination and bias,

³⁷² Moodley, M. (2012) ; Haupt, T., & Madikizela, K. (2010) ; Agherdien & Smallwood (2017) ³⁷³ Moodley, M. (2012)

³⁷⁴ Fisher (2002) in Agherdien & Smallwood (2017) ³⁷⁵ Pathways study interview with private company

³⁷⁶ Pathways study interview with private company ³⁷⁷ Haupt, T., & Madikizela, K. (2010)

Black African people face barriers to secure a relevant internship.³⁷⁸

“Residential real estate agency space is saturated by women because historically real estate agents were most likely moms who were not working, who were at home with their children, and wanted the kind of work that was flexible enough for them to be able to spend time with their children and be able to earn a living.”

Source: Private Company (Pathways Study Interviewee)

Real estate agencies are seen as flexible work environments for women. Unpaid care responsibilities are seen as a main driver of women entering real estate employment, which provides flexibility, but lower guarantee of stable salary. Pathways Study informants have indicated that this profession is flexible and allows women to manage their own time, allowing them to balance work and home responsibilities.³⁷⁹

Gender-based violence and harassment (GBVH) is prevalent in the sub-sector. Women experience high levels of sexual harassment within the construction industry.³⁸⁰ According to a 2012 study, 9% of women working in the construction

industry interviewed had experienced sexual harassment.³⁸¹ According to Pathways Study interviewees, high levels of gender-based violence are prevalent in property services. This is because many professions within the industry, such as property agents and property valuers, require face-to-face meetings with clients at the property sites. A key informant working for a valuation company explained that women may be reluctant or hesitant to enter the property valuation business because of safety concerns.³⁸² In response, some private companies within the industry are implementing GBVH prevention policies. For example, at one property company (Fine & Country), buyers and sellers are required to submit their identification before a viewing, and viewings are usually conducted in pairs.³⁸³

Individual factors

A number of stakeholders provide skills development opportunities. For example, the mission of the Services Sector Education and Training Authority (SSETA) is to facilitate skills development for employment and entrepreneurship in the services sector, which includes real estate and related services. This includes special projects benefiting disadvantaged groups including women, and a commitment to buy 30% of goods and services from businesses owned by Black African women.³⁸⁴ The WPN supports women with educational programmes and

³⁷⁸ Pathways study interviewee, university representative ³⁷⁹ DWYPD (2019) ³⁸⁰ Haupt, T., & Madikizela, K. (2010)

³⁸¹ Moodley, M. (2012) ³⁸² Pathways study interview with private company ³⁸³ Pathways study interview with private company

³⁸⁴ Department of Higher Education and Training (2021)

bursary opportunities for female students wishing to work in the real estate sector;³⁸⁵ SAWIC provides technical expertise and financial literacy training to women in construction;³⁸⁶ and NCI programmes support SMEs in the construction industry, with a strong focus on female contractors and youth.³⁸⁷ However, women continue to face barriers to accessing and benefiting from such training schemes. Pathways Study interviewees highlighted that although institutions provide training, they do not provide linkages to job opportunities,³⁸⁸ and that some initiatives are not well marketed, so not many people know about them.³⁸⁹

Development/Construction

Women face financial and educational barriers to working in managerial and professional fields in the sub-sector.³⁹⁰

However, even when women in the sub-sector do have backgrounds in engineering, architecture, surveying or similar fields, they may lack field specific tertiary and professional qualifications and experience.³⁹¹ For example, individuals who are interested

in becoming property surveyors need to complete a field-specific B.Sc., ND, or B.Tech at a university recognised by the South African Geometrics Council (SAGC), and they also need to complete an internship with a registered property surveying company, which is followed by an SAGC exam that allows for paid registration as qualified property surveyors.³⁹² Similarly, architects need to complete a field-specific Bachelor's and Master's in Architecture, as well as an internship at a registered architect firm. They then need to pay a fee and register with the South African Council for the Architectural Profession, which allows them to practise their profession.³⁹³ Furthermore, women lack access to information on employment opportunities in the real estate sector. Pathways Study interviewees highlighted that this barrier particularly affects young women living in rural areas.³⁹⁴

Skills gaps of women entrepreneurs in the construction industry limits their profitability. Enterprises that are registered as CIDB contractors are graded based on financial

“Architecture is a difficult field to get into for women. Women need to go through extensive training, have had previous experience (perhaps through family) and need to have access to finance (either through family or loans). This means that it is not a sector that many informal women possibly can partake in.”

Source: Private Company (Pathways Study Interviewee)

³⁸⁵ WPN (n.d.) ³⁸⁶ Shall, S. (n.d.) ³⁸⁷ 3SMedia (2020) ³⁸⁸ Pathways study interview with sector stakeholder, network ³⁸⁹ Pathways study interview with sector stakeholder, private company ³⁹⁰ Moodley, M. (2012) ³⁹¹ Moodley, M. (2012) ³⁹² South African Geomatics Council (n.d.) ³⁹³ The South African Council for the Architectural Profession (n.d.) ³⁹⁴ Pathways study interview with key stakeholder

“There are a lot of men in senior positions in the real estate sector. Promotions are too often based on social relationship. Men in the sector form “boys clubs” and as a woman it is difficult to get in there. As promotions and career growth opportunities are often based on friendships and social relationships between men, women have it harder to climb up the career ladder.”

Source: Private Company (Pathways Study Interviewee)

and works capability on a scale from 1 to 9, with 1 being the lowest;³⁹⁵ the majority (83%) of women-owned enterprises are registered at grade 1, and only 5% are registered at grades 4 and above. Only four women-owned enterprises (out of over 70,000) were registered at grade 8 in 2017.³⁹⁶ A study looking at reasons for failure among women-owned construction companies in Kwazulu-Natal found that lack of technical skills, as well as business and financial skills were key challenges.³⁹⁷ Pathways Study interviewees suggest that lack of funding for training is a key barrier for women entrepreneurs.³⁹⁸

Women’s lower social capital is a key barrier to entrepreneurship and advancement in the industry. A study looking at reasons for failure among women-owned construction companies in Kwazulu-Natal found that lack of support and access to networking opportunities was one of the challenges.³⁹⁹ Similarly, Pathways Study key informants suggest that lack of networking and knowledge sharing is a key barrier for women entrepreneurs.⁴⁰⁰ However, there are a number of organisations actively advancing

women’s roles in the industry. For example, the Women’s Property Network provides a platform for women in the commercial property industry to advance their careers through promotion of women’s role in the industry, educational programmes and bursaries, and networking opportunities.⁴⁰¹ Similarly, SAWIC provides networking opportunities, and was founded to support women in accessing contracts, training, finance and networks.⁴⁰² The company is mainly led by women, with Black African women accounting for 95% of its staff. Overall, the organisation has a total of 600 members across the country.⁴⁰³

“Women truly want to take part in the formal sector, but often don’t have the finances. There should be some way of creating your business plan and going somewhere to get money to do it, but it just doesn’t happen. And it is difficult for women to push through.”

Source: University Stakeholder (Pathways Study Interview)

³⁹⁵ CIDB (2021b) ³⁹⁶ Agherdien & Smallwood (2017) ³⁹⁷ Ndimande, J. H. (2019) ³⁹⁸ Pathways study interview with sector stakeholders
³⁹⁹ Ndimande, J. H. (2019) ⁴⁰⁰ Pathways study interviews with sector stakeholders ⁴⁰¹ Women’s Property Network. (n.d.)
⁴⁰² Shall, S. (n.d.) ⁴⁰³ Shall, S. (n.d.)

Access to finance and capital is a key challenge to women's entrepreneurship in the construction industry.

Pathways Study interviewees suggest that lack of access to capital is a key barrier for women entrepreneurs.⁴⁰⁴ Most projects require a performance guarantee (10%), which many women cannot raise due their limited access to finance. In some cases, this means that women may lose contracts that they had won through competition as they are not able to raise the required capital on time. This in turn leads to lack of continuity of work, which further exacerbates the lack of access to finance. Some women entrepreneurs use personal capital to finance projects, but this practice has some risks, especially if the project is not completed.⁴⁰⁵

Recommendations

1. Support multi-stakeholder initiatives to create opportunities for women in the real estate sector

Recommended strategies include:

- Financial institutions could design joint venture products to finance women-led companies and collectives in real estate development. These should be targeted at entities with (the potential to obtain) construction contracts, but lacking adequate capital/financing.
- Work with key stakeholders including SAWIC and WPN to constructively and positively raise the profile of women in

the real estate sector. For example, work in schools and communities to raise awareness of opportunities for women in the sector, through promotion of role models and tackling misconceptions and stereotypes.

- Work with real estate employers to tackle gender discrimination in the sector through gender- responsive policies and plans.
- Support TVET initiatives targeting women with career-relevant training programmes which link trainees with paid internships and job opportunities.
- Work with universities and employers to support scholarships or paid apprenticeships, or other forms of on-the-job training, for women, and other unrepresented employees.
- Work with key stakeholders including SAWIC and WPN to facilitate networking opportunities and promote mentorship schemes linking new entrants with senior women leaders in the industry.
- Advocate for and support the implementation and monitoring of government laws and policies promoting gender representation and diversity in employment and procurement for construction projects, including due diligence processes to roll out improved standards along the value chain.

⁴⁰⁴ Pathways study interviews with sector stakeholders ⁴⁰⁵ Moodley, M. (2012)

2. Work with employers in the real estate sector to promote gender-responsive workplaces

Recommended strategies include:

- Work with sector stakeholders (including employers and business associations) to challenge attitudes towards gender roles and stereotypes in the sector.
- Support and incentivise construction companies to use existing tools developed by the World Bank and other actors to self-assess gender and GBVH risks of construction projects and put in place sufficient mitigating measures.
- Promote gender-sensitive workplaces and organisational cultures, including specific work targeting senior leadership, and risk and mitigation of gender-based violence and harassment.
- Advocate for real estate companies to adopt minimum basic entry pay, and/or work with employers to offer bursaries for women from marginalised groups to join the workforce for example through paid internships.
- Support gender-benchmarking initiatives including gender pay gap assessments to incentivise employers to adopt more gender-responsive policies.
- Support establishment and roll out of gender equality and inclusion policies, including childcare provisions, and flexible work opportunities (leveraging the flexibility already offered by some real

estate roles to expand to other more male-dominated areas of the sector including senior leadership positions).

- Advocate for the inclusion of women professionals in urban planning and design programmes - both by private and public entities, to improve the integration of women-focused initiatives in urban planning efforts and execution/development. This will help ensure that services and provisions that cater to women's specific and contextual needs are addressed.

3. Support holistic skills training for women entrepreneurs in the sector

Recommended strategies include:

- Invest in vocational training programmes and organisations, focus on sector-specific skills, business and financial skills, as well as networking opportunities.
- Provide bursaries for relevant studies and qualifications.
- Ensure sufficient outreach to ensure schemes and opportunities are inclusive of women from marginalised communities and rural communities.
- Improve women's access to financial services through linking up with low-cost loans and financial products aimed at women entrepreneurs in the real estate sector.
- Work with financial providers to tailor products and services to women's needs,

including utilising mobile money lending, and tailor communication and marketing strategies to reach Black African women specifically, to ensure they are not left out.

- Leverage existing initiatives delivered by SAWIC and WPN linking women with networking opportunities and mentorship schemes.

4. Address research gaps and build evidence of what works

Recommended strategies include:

- Commission and undertake primary research with women in the sector to understand gender-related barriers and opportunities. This should include mixed-method research with different sub-groups of women to understand different barriers and challenges faced within different parts of the real estate sector and to design inclusive interventions.
- Work with SAWIC and WPN to undertake action research with women in the sector to understand entry points and gather evidence on what works to economically empower women through targeted interventions.
- Evaluate interventions and include outcomes and indicators related to women's economic empowerment as well as related outcomes linked to experience of gender-based violence and sexual and reproductive health to provide an accurate picture of the impact on any intervention on women's lives.

5.3 Wholesale and retail trade

Sector overview



The wholesale and retail trade (WRT) sector is the foundation of goods distribution (i.e. from supplier to intermediary and final consumer).⁴⁰⁶ Goods include household furniture, appliances and equipment (which make up 46% of the sector), as well as pharmaceuticals, food, beverages, tobacco, textiles, clothing and footwear.⁴⁰⁷

Wholesale and retail trade has been one of the key sectors driving aggregate employment growth in post-apartheid South Africa. It employs approximately 21% of the active labour force or over three million people,⁴⁰⁸ employed in over 87,000 wholesale and retail enterprises.⁴⁰⁹ This includes over two million people employed in formal labour and an additional one million people in informal jobs.⁴¹⁰

The majority of enterprises are small-scale enterprises (88%), with just 3% classified as medium sized and 1% classified as large companies.⁴¹¹ Economic growth in this sector occurs mainly in urban areas, including the provinces of Gauteng, Western Cape and Kwa-Zulu Natal. Together, these provinces make up 76% of the total national WRT sector workforce.⁴¹²

⁴⁰⁶ Malgas, B., Mutize, M., & Mason, R. (2020) ⁴⁰⁷ W&R SETA (2020) ⁴⁰⁸ W&R SETA (2020) ⁴⁰⁹ W&R SETA (2017)

⁴¹⁰ W&R SETA (2017) ⁴¹¹ W&R SETA (2017) ⁴¹² W&R SETA (2011:6) in Steyn, J., & Sewell, W. (2013)

However, a minority of large corporations dominate sales. A few dominant sales groups operate in South Africa.⁴¹³ For example, in food sales, the four large corporate supermarket retailers (Shoprite, SPAR, Pick n Pay and Woolworths) control 70% of sales.⁴¹⁴ Large supermarkets in turn influence suppliers' standards and pricing. High-quality and cost-competitive products involve additional costs for suppliers, making it harder particularly for smaller suppliers.⁴¹⁵

Retailers have multiple store formats and segment based on consumers, from the mass market to wealthier consumers. Mass-market consumers are price sensitive, driving the retail segment to be competitive and highly price orientated.⁴¹⁶ Retail has been moving towards shopping centre- or mall-based retailing, with negative implications for informal and micro retail traders.⁴¹⁷ This trend can also be seen in rural areas and townships, where independent retailers face new competition from larger retailers entering these markets.⁴¹⁸

Improvements in technology have influenced changes within the sector and provided opportunities for improved efficiency and business models. At the same time, these technological developments have given more power to consumers, who now have better access to information and increased demand for ethical and sustainable commitments.⁴¹⁹

The sector is a major employer of both unskilled and semi-skilled labour.⁴²⁰ Basic entry into the WRT sector requires minimal skills. At the lower end of the spectrum, within the formal sector, inter-personal skills and basic computer and numeracy skills are required. In the self-employed segment and middle-to-upper skilled roles, financial literacy and basic accounting becomes a key requirement.⁴²¹

The sector suffers from skills gaps for higher-skilled positions (such as retail managers) and in rural areas. In addition, as employers adapt to technological advances, IT skills are increasingly becoming a priority area.⁴²² Pathways Study interviewees further highlighted gaps in financial literacy (including budgeting, accounting, cash flow management).⁴²³ W&R SETA highlights that skills needed include financial management, product knowledge, marketing and sales, communication, merchandising negotiation, technical, conflict management, buying, pricing, time management, customer relations, ICT, life skills and coaching.⁴²⁴

The initial impact of the COVID-19 pandemic and subsequent lockdowns had a direct impact on the sector, with many shops being forced to close, while customers' purchasing power decreased. However, at the same time, some traditional brick-and-mortar chains expanded or experienced growth in online sales.⁴²⁵ Furthermore, the pandemic

⁴¹³ Malgas, B., Mutize, M., & Mason, R. (2020). ⁴¹⁴ Neves, D. (2020) ⁴¹⁵ Das Nair, R., & Chisoro, S. (2017) ⁴¹⁶ Neves, D. (2020)

⁴¹⁷ (Müller 2013; Charles 2013) in Steyn, J., & Sewell, W. (2013) ⁴¹⁸ Makhitha, K. (2017) ⁴¹⁹ W&R SETA (2020)

⁴²⁰ W&R SETA (2020) ⁴²¹ Pathways study interview with private organisation ⁴²² W&R SETA (2020)

⁴²³ Pathways study interviews with sector stakeholders ⁴²⁴ W&R SETA (2020) ⁴²⁵ Arab News (2020)

has driven a faster digital transformation within the sector, with customers increasingly adopting e-commerce.⁴²⁶

The COVID-19 pandemic had an impact on the sector's revenues in 2020. At the beginning of 2020, the WRT sector was contributing over 12% of GDP, but this declined by 67% during the second quarter of 2020.⁴²⁷ Job losses were the highest in the trade industry. Over 180,000 additional annual job losses were reported in the sector in the second half of 2020 (June 2020 compared with June 2019).⁴²⁸ According to a Pathways Study interviewee (government stakeholder), the formal sector of WRT experienced over 1.3 million jobs lost, with women accounting for around 40% of that figure.⁴²⁹

Multiple actors operate in the WRT sector. These include wholesalers (including importers), retail organisations (consumer corporations, department stores, chain

stores and cooperatives), consumer retailers, franchises and after-sales agents.⁴³⁰ Other stakeholders include the Retail Motor Industry Association (RMI), The Fuel Retailers Association (FRA), the Retailers Association (RA), the Consumer Goods Council of South Africa (CGCSA), Business Unity South Africa (BUSA), the Wholesale and Retail Sector Education and Training Authority (W&R SETA), the Higher Education and Training (HET) and Further Education and Training (FET) Committees, and private training providers.⁴³¹

From the stakeholder mapping exercise for the WRT sector, 53 stakeholders were identified across South Africa. A summary table of stakeholder types across the provinces is shown here, and the detailed information about stakeholders' activities (including women-focused provisions) can be accessed [here](#) on the Pathways Study website.

Stakeholder Type	Province						
	Free State	Kwazulu-Natal	Gauteng	Limpopo	Western Cape	Eastern Cape	National
Associations, collectives, organisations, representative bodies	1	2	-	1	-	-	8
Private companies	-	1	1	-	-	-	14
NGOs/CSOs	-	-	-	-	3	-	8
Government agencies/ departments	1	-	1	-	-	1	11
TOTAL	2	3	2	1	3	1	41

⁴²⁶ W&R SETA (2020) ⁴²⁷ W&R SETA (2020) ⁴²⁸ Statistics South Africa (2020)

⁴²⁹ Pathways study interview with a government stakeholder ⁴³⁰ International Trade Administration (2021) ⁴³¹ W&R SETA (2015)

Role of women

The WRT sector is the second largest employer of women, accounting for 22.1% of employed women in South Africa.

This accounts for just under one third of all employment of semi-skilled women in South Africa.⁴³² According to a Pathways Study interviewee, most women working in the sector are in either low-skilled or semi-skilled roles. Just over 40% of unskilled workers are women (of which the majority are Black).⁴³³ In the lower-skilled areas, women generally hold job roles such as cashiers, shelf packers and food handlers.⁴³⁴

Women are represented in higher-level jobs, although to a lesser extent than men.

In 2020, women made up almost half (44.9%) of professionals in the sector and 23.6% of top management employees.⁴³⁵ Women were overrepresented in service and sales positions, where 52% of all women workers and 31% of male workers were employed.⁴³⁶ Black African women are less represented in managerial and professional positions. In 2020, most (66.4%) of the top management employees were White, and only 15.1% were Black Africans. In professional positions, Black Africans were better represented and made up 40.2% of the workforce, while 37.4% were White.⁴³⁷

Over half of self-employed women in South Africa work in this sector: 51.8% of all self-employed women (2016 data) and 62.7% of all informal self-employed women (2017 data) work in the WRT sector.⁴³⁸ According to a Pathways Study interviewee, it is not uncommon for these women to employ one or two additional staff members, generally as an on-seller within their business.⁴³⁹ Many women run “Spazas” (home-based shops), and offer convenience shopping to surrounding households. They are generally run informally and often by women in combination with household and childcare.⁴⁴⁰ Street hawkers are also more likely to be women, who typically have limited family support and tend to move around on foot.⁴⁴¹

⁴³² DWYPD (2019) ⁴³³ W&R SETA (2020) ⁴³⁴ Pathways study interview with government representative

⁴³⁵ W&R SETA (2020) ⁴³⁶ W&R SETA (2015) ⁴³⁷ W&R SETA (2020)

⁴³⁸ StatsSA, Labour Market Dynamics 2016, SESE 2017 in DWYPD (2019) ⁴³⁹ Pathways study interview with NGO

⁴⁴⁰ Competition Commission South Africa (2019) ⁴⁴¹ W&R SETA (2020)

Summary of barriers to and opportunities for women’s economic empowerment in the WRT value chain

Barriers

Structural	Normative	Individual
<p>Casualisation of sector; labour laws and legislation do not cover many informal jobs</p> <p>Implementation gaps of the Employment Equality Act (1998)</p> <p>White dominated management structures</p> <p>Gender pay gap</p>	<p>Discrimination towards women and non-white employees for higher level roles</p> <p>Lack of role models</p> <p>Safety on transport</p>	<p>Skills gap and lack of training opportunities</p> <p>Limited access to finance</p>

Opportunities and Entry Points

Structural	Normative	Individual
<p>Labour laws and legislation</p> <p>Minimum wages are set, and companies are required to submit reports.</p> <p>Code of Good Practice on the Prevention and Elimination of Harassment in the Workplace</p> <p>Public support for skills development</p> <p>W&R SETA targets women and unemployed youth with skills development opportunities</p>	<p>Home-based and flexible roles which offer flexibility around childcare</p> <p>Childcare provisions</p>	<p>On-the-job training opportunities</p> <p>Supermarket initiatives targeting women-owned enterprises with capacity building and access to credit</p>

Structural factors

The nature of jobs in the sector is changing, increasingly moving towards less skilled, low quality and casual employment opportunities, with implications for women's work conditions and economic opportunities in the sector. Work in the sector has become increasingly casualised and in some cases, large retailers only employ casual workers. Merchandising has become increasingly outsourced and centralised, leaving only lower skilled opportunities at points of sale. Labour saving technologies have also had an impact on job losses in the sector, and for jobs in warehousing and logistics.⁴⁴² Casual workers do not receive healthcare, education opportunities and minimum wages.⁴⁴³

The Employment Equality Act (1998) focuses on reducing discrimination in employment. Research targeted at retailers and other stakeholders with expertise or direct involvement with employment equality highlighted some challenges in implementation. These include lack of support from leadership, and lack of understanding of requirements. In addition, the study found that a White-dominated management culture persists, which often excludes Black African people from securing jobs and progressing in the sector.⁴⁴⁴

Minimum wages are set for the sector.

Minimum wages are set based on the sector of employment and set out wages for different roles.⁴⁴⁵ The latest amendment for the WRT sector came into effect in March 2022.⁴⁴⁶ In addition, in an attempt to improve transparency and address the gender wage gap, new human resource legislation requires companies to submit income differential reports.⁴⁴⁷ However, despite this minimum wage legislation, a Pathways study interviewee highlighted a persistent gender wage gap in the sector as a key barrier to WEE opportunities.⁴⁴⁸ Similarly, qualitative research carried out with retail representatives found that women earn less than men in retail.⁴⁴⁹

The government provides public support to skills development for the sector through the W&R SETA, which derives its mandate from the 1998 Skills Development Act (as amended). The entity supports skills development and disburses grants for learning programmes and monitoring of education and training as outlined in the Act and accompanying regulations, and in the National Skills Development Plan (NSDP). Women and unemployed youths are considered important target groups for upskilling and entering the sector.⁴⁵⁰

⁴⁴² Malgas, B., Mutize, M., & Mason, R. (2020) ⁴⁴³ W&R SETA (2020) ⁴⁴⁴ Roman, L., & Mason, R., (2015)

⁴⁴⁵ Department of Labour (2006) ⁴⁴⁶ LWO (2022) ⁴⁴⁷ Pathways study interview with sector association

⁴⁴⁸ Pathways study interview with sector association ⁴⁴⁹ Malgas, B., Khatle, T., & Mason, R. (2017) ⁴⁵⁰ W&R SETA (2020)

Normative factors

Qualitative research aimed at retail representatives found that women are still discriminated against in opportunities for promotion and management positions.

Women from rural areas are particularly disadvantaged. A lack of role models or mentors contributes to women's lack of progression within the sector.⁴⁵¹ There is also lack of black role models and mentors in the retail sector.⁴⁵²

There is lack of sector specific data on gender-based violence and harassment (GBVH) in retail, although limited evidence suggests it is prevalent. Gender-based violence further affects women's ability to travel safely, which in turn hinders the ability to acquire goods for sale, to network and to conduct business. The problem is amplified for women on lower incomes and in rural areas who depend on public transport.⁴⁵³ Another informant suggests that security and safety are a challenge for all women, since violent crime is an issue.⁴⁵⁴

“Sometimes you just need role models. You need to see more people that can look like you to inspire you. So having the presence of women in trade, championing the space will drive interest and growth of women in the sector.”

Source: Government Stakeholder (Pathways Study Interviewee)

Women's unpaid care and domestic work burden present barriers to WEE opportunities in the sector. Qualitative data collected among retailers shows that traditional norms push women to take care of their families first and consider their career aspirations later.⁴⁵⁵ “Spaza” shops and other home-based informal employment opportunities in the sector offer women flexibility around childcare.⁴⁵⁶ However, women in these informal positions lack protection and security offered to formal employees.

“One of the main barriers for women to advance in the trade sector is the familial responsibility, the cultural aspect that expects women to meet expectations that they must still hold down the house after work. Other barriers next to that are corporate culture; lack of willingness from decision makers to advance women in the corporate ladder and confidence from women wanting to ask for a raise.”

Source: Association (Pathways Study Interviewee)

⁴⁵¹ Malgas, B., Khatle, T., & Mason, R. (2017) ⁴⁵² Roman, L., & Mason, R., (2015) ⁴⁵³ Pathways study interview with NGO representative

⁴⁵⁴ Pathways study interview with NGO representative ⁴⁵⁵ Malgas, B., Khatle, T., & Mason, R. (2017)

⁴⁵⁶ Competition Commission South Africa (2019)

Individual factors

The sector has seen an increase in women's representation in the skilled technical/ junior management level to professionally qualified/middle management level. However, these gains have not yet translated into representation at top and senior management levels.⁴⁵⁷ A qualitative research study among retailers found that inadequate command/ understanding of business languages, such as English, are barriers particularly for rural women. These influence opportunities for promotion or hiring into management positions. The research also found a lack of training targeted at rural women to support them in their career. When training is available, it is often badly organised or insufficient to prepare women for management positions.⁴⁵⁸ Finally, research targeted at retailers and other stakeholders with expertise or direct involvement with employment equality found that Black African staff are not systematically developed and trained, and that there is little or no effective talent management.⁴⁵⁹

Women's lower access to finance limits their business prospects in the sector. A Pathways Study interviewee explained that women's ability to access financing for a viable business opportunity is complicated by lack of credit history and lack of assets for collateral (often the assets required are

“Women have limiting beliefs on what they can achieve since accessing the resources is tough; access to technology, access to decent networks. Especially women in the townships are not linked to the formal economy so there is a profound isolation issue.”

Source: NGO Stakeholder (Pathways Study Interviewee)

in the husband's name).⁴⁶⁰ Challenges in the WRT value chain for women include access to finance, information and cash-generating assets, cash flow (people insisting on buying on credit), as well as access to quality merchandise.⁴⁶¹

Several supermarkets have been creating opportunities for and supporting women suppliers. For example, the Woolworths Enterprise Supplier Development (ESD) programme works with emerging Black African women-owned businesses, and supports them to enter its supplier base, by providing capital and capacity building. The 46 businesses that Woolworths worked with in 2019, reported an increase in total revenue (from ZAR246 million to ZAR293 million). Pick n Pay, Shoptite and Massmart also provide opportunities and support for SME suppliers, while SPAR works directly with smallholder suppliers (although none of these initiatives are focused on women).⁴⁶²

⁴⁵⁷ CEE (2018/2019) in W&R SETA (2020) ⁴⁵⁸ Malgas, B., Khatle, T., & Mason, R. (2017) ⁴⁵⁹ Roman, L., & Mason, R. (2015)

⁴⁶⁰ Pathways study interview with private sector representative ⁴⁶¹ Pathways study interview with NGO

⁴⁶² Competition Commission South Africa (2019)

Recommendations

1. Support multi-sectoral gender-focused initiatives to promote increased economic opportunities for women in the value chain.

Recommended strategies include:

- Develop supermarket-led initiatives to increase engagement of women-led and Black African-owned businesses in the value chain. These initiatives should target and provide capacity building support and opportunities to women-owned enterprises.
- Work with business associations to support women-owned businesses with professional networking and mentoring opportunities.
- Work with large retailers and other buyers to implement downward supply chain initiatives, particularly to support small suppliers, women-owned and Black-owned businesses, as well as suppliers from rural areas and townships.
- Work with women owners of “Spaza” shops and other informal home-based enterprises to collectivise through cooperatives, and support women through these cooperatives to improve their human, social and financial capital through market-based interventions.

2. Work with employers to promote gender-responsive workplaces

Recommended strategies include:

- Promote gender-sensitive workplaces and organisational cultures, including specific work targeting senior leadership as well as support establishment and roll out of gender equality and inclusion policies, including childcare provisions, flexible work opportunities as well as inclusive training and career progression opportunities.
- Work with employers to promote zero tolerance towards gender-based violence and harassment in the workplace, ensuring appropriate reporting and referral mechanisms are in place for survivors, and policies and procedures are rolled out through due diligence processes to downward partners.
- Support diversity-, equity- and inclusion (DEI)-focused interventions with employers to promote more inclusive and equitable workplaces.
- Support the roll out of gender and DEI-benchmarking initiatives in the sector including gender pay gap assessments to incentivise employers to adopt more gender-responsive and inclusive policies, procedures and behaviours.

3. Support women-owned small independent retailers (formal and informal)

Recommended strategies include:

- Support women to organise in retail and trade cooperatives, for better price setting, market opportunities and linkages, and access to training (including business skills, financial management and leadership).
- Support small and informal retailers with financing targeted at securing competitive and reliable supply of goods.
- Work with financial providers to tailor products and services to women's needs, including utilising mobile money lending, and tailor communication and marketing strategies to reach women and Black African retailers.
- Collaborate with financial institutions and key retailers to develop financing support for screened and approved women retailers to benefit from invoice discounting facility arrangements for entities with which they have confirmed supply orders.
- Create opportunities for women entrepreneurs to build professional networks through business-to-business linkages.
- Support women-owned informal businesses to formalise their businesses.
- Implement household-level interventions to improve relationship dynamics, mitigate against backlash from women's increased earnings, promote gender-equitable

household decision-making and prevent intimate partner violence.

4. Implement holistic skills building and vocational training to improve women's employment opportunities in the sector

Recommended strategies include:

- Invest in holistic vocational training programmes focusing on sector-specific skills to address gaps including financial management, product knowledge, marketing and sales, communication, merchandise negotiation, conflict management, buying, pricing, time management, customer relations, ICT and life skills. Ensure targeting of Black African women and other marginalised groups through quota systems, scholarships, paid apprenticeships and targeted outreach.
- Targeted interventions to address skills gaps in rural areas. These should be aimed at equipping rural women with skills needed for higher-skilled roles such as retail managers (IT skills, leadership and management skills) and linking graduates with employment opportunities.
- Focus on skills for roles and areas where women are less represented, work alongside companies to promote hiring of women and for mentorship opportunities. Support initiatives that link skilled female candidates to job opportunities where opportunities for career advancement exist.

5. Address research gaps and build evidence of what works

Recommended strategies include:

- Commission and undertake research on gender-related barriers for women's economic empowerment in the sector, including much needed research on the prevalence and dynamics of gender-based violence and harassment in the sector.
- Commission and undertake research with marginalised groups (such as Black African women, young women and women with disabilities) to understand different barriers and challenges women face, and to design inclusive interventions.
- Evaluate interventions and include indicators and outcomes related to women's economic empowerment as well as related outcomes linked to experience of gender-based violence and harassment and sexual and reproductive health, to provide an accurate picture of the impact of any intervention on women's lives.
- Ensure meaningful participation of women in the design of all interventions, including through participatory methods.



6. Implications and recommendations

While South Africa has made significant progress on gender equality indices, including in the areas of education, political participation and formal labour market participation, the findings have highlighted significant structural, normative and individual level barriers that limit women in South Africa's economic empowerment and wellbeing. These factors influence women's roles and experiences in the value chain in different sectors in different ways, but with clear trends in factors such as norms around unpaid care and domestic work, women's access to social capital, limited decision-making power, gender-based violence and harassment, and overarching patriarchal barriers and stereotypes. In the South African context, race discrimination intersects with gender discrimination to make Black African women especially vulnerable to undesirable economic outcomes.

Enabling and improving women’s economic opportunities and long-term sustainable value chain involves synergistic and multi-level programming efforts. Programmes that prioritise individual skill gaps along with addressing socioeconomic and psychological norms can influence change across different domains - from household to societal level. Careful and thoughtful consideration of contextual and normal factors are critical to not exacerbate discrimination.

The findings highlight significant opportunities to enhance South African women’s economic empowerment and potential. A coordinated, multi-pronged and multi-stakeholder approach must be adopted to address and tackle barriers identified at each level. At the same time, it is critical to recognise what is working within the country, namely programmes with potential for scale and high levels of impact.

The recommendations below identify key priorities for women’s economic empowerment in South Africa, as well as suggested strategies targeting barriers to women’s economic empowerment while leveraging existing opportunities and building on existing law and policy commitments of the government. The recommendations are intentionally broad, to encompass a range of stakeholders including policy makers, programmers⁴⁶³

and researchers. These proposed recommendations can serve as a starting point for further deliberations by multiple stakeholders including government to ensure actionable interventions within mutually agreed timeframes.

6.1 Policy/Advocacy recommendations

Current situation

- Limited legal protection for South Africa’s informal workers - where a significant proportion of women are situated.
- Gaps between implementation and practice lead to gender discrimination in employment practices in many sectors including a significant gender pay gap.
- There is a need for better data, monitoring and reporting systems of gender-responsive budgeting (GRB) efforts including service delivery efforts, as well as better integration of gender within spending reviews.
- Policy gaps around the role of women in rural development.
- Several substantial government-led WEE programmes and youth employment programmes exist, but there is a lack of data and evidence on how and what ways they have benefited women.

⁴⁶³ This includes both those engaged in WEE-focused programmes and initiatives, as well as more general economic development programming which may not have women’s economic empowerment as a central aim

1. Address key policy gaps to improve protection of the informal workforce and improve the implementation of existing WEE-related commitments, legislation and programmes

Recommended strategies for consideration include:

- Work with the government to extend labour rights provisions to informal workers including as a priority, development and implementation of legal and regulatory frameworks for the rights of informal domestic workers.
- Support gender- and inclusion-benchmarking initiatives of employers to improve monitoring and enforcement of labour rights legislation, while incentivising greater compliance.
- Initiatives targeted at reducing the gender pay gaps, through for example, mandatory reporting for public and private sector entities.
- Support civil society and community-led monitoring initiatives of the implementation and outcomes of gender-responsive budgeting (GRB) at the local level, as well as WEE-related policy commitments. This includes advocating for the development of government-approved guidelines for implementing the provision that reserves 40% of public procurement for women-owned businesses (WOBs). Also, staff of public procurement entities should be sensitised on the importance and significance of the provision for WOBs.
- Work with government to integrate gender within spending reviews and processes to improve budgeting decisions.
- Strengthen implementation of policies, accountability and remediation mechanisms on equal land ownership, sexual harassment and gender-based violence, including through strengthening cooperation across government departments and the women's movement.
- Leverage, expand and improve on existing WEE programmes and youth employment programmes. Commission studies to understand whether and how these initiatives have led to improvements in WEE outcomes (i.e. for which categories of women) and use findings to strengthen the impact of these programmes on women.
- Ensure inclusive policies for cooperative enterprises and women-led cooperatives/networks.
- Address policy gaps on the role of women in rural development and specifically support the formation of policies and programmes which address the interface between rural women, rural development and traditional leadership and governance structures.
- Support the newly formed committee on rural women's land rights oppression to deliver interventions to strengthen women's land rights, and address specifically the barriers posed by customary laws that constrain women's access to land.

Current situation

- Persistent gender equalities across multiple domains.
- Significant gender equalities in access to land.
- Gender norms and stereotypes about women in leadership mean that women leaders continue to be perceived as weak leaders and not trustworthy by citizens at large.
- High levels of gender-based violence including intimate partner violence, and harassment in the workplace.

2. Undertake community level sensitisation, capacity building and advocacy around existing legislation to strengthen women's rights.

Recommended strategies for consideration include:

- Training and capacity building of key duty bearers including traditional customary structures, local government and law enforcement on key legislation regarding women's right to land ownership, to reduce bias and discrimination against women, and improve transparency and consistency of decision making.
- Prioritise female-headed households and facilitate community-level conversations and peer-to-peer training, e.g. with elders/chiefs, social workers, community health volunteers, teachers and other stakeholders on women's land rights and constitutional law.

- Focus on young women and adolescent girls to enable long-term, transgenerational behaviour change and improved educational outcomes.
- Strengthen behaviour-change communications focused on gender-equitable attitudes, as well as promoting positive non-violent relationships.
- Identify role models (including men) to act as champions for behaviour change towards gender equality within communities.

Current situation

- Women are more likely to save informally.
- Women are also less likely than men to make mobile phone-enabled transactions.
- Limited access to capital or credit constrained women's ability to invest in, start, or expand their businesses.
- Barriers to accessing formal credit include shortage of start-up capital and collateral, gender- inequitable attitudes and lack of gender awareness of bank staff and financial institutions and lack of access to information.

3. Advocate to remove gender-based barriers to finance and promote women-friendly financial services.

Recommended strategies for consideration include:

- Engage women meaningfully in the design of financial services and products (including mobile money products), to ensure that they are accessible for all women including those most marginalised (such as young women, women with disabilities, rural and illiterate small holders, etc.).
- Introduce legal and regulatory frameworks that enable women to access credit, and criminalise discriminatory practices.

6.2 Programming recommendations⁴⁶⁹

Current situation

- Women spend 71% of their productive time on household production at every age.
- Women's unpaid care burden especially hinders formal employment opportunities.
- Lack of provisions or allowances for women's family and social roles (such as flexible working or sufficient childcare provisions of most employers).

- COVID-19 pandemic has exacerbated inequalities in gendered division of unpaid care work and labour, contributing disproportionate job losses among women.

1. Assess and address women's and girls' unpaid care and domestic work burden so that more of them can acquire marketable skills, and work for pay outside the household.

Recommended strategies for consideration include:

- Carefully assess the extent to which project activities could increase women's workload, and actively incorporate time- and labour-saving interventions targeted at women.
- Work with the private and public sectors to ensure that households have access to energy, water, hygiene and sanitation facilities in order to reduce women's and girls' drudgery and time poverty.

Current situation

- Women's lack of access to professional networks can hinder their economic opportunities.
- Rural women are disproportionately affected by the impact of climate change.
- Common barriers faced by women entrepreneurs include access to knowledge and skills for starting

and running a business, unpaid care responsibilities, access to information about finance, access to finance and difficulties in connecting with markets.

2. Work with and grow women's collectives to build social, human and economic capital, and tackle normative barriers.

Recommended strategies for consideration include:

- Support the formation of new women-led cooperatives in growth sectors.
- Build women's business skills and increase their access to information and finance.
- Ensuring that all work to support cooperatives includes a focus on supporting women to aggregate, reach more lucrative markets, and receive better prices for their goods.
- Build disaster- and climate-resilient strategies that are adopted and integrated into women's collectivisation. This could include developing and implementing programmes, introducing new techniques and funding infrastructure initiatives around gender and climate-smart initiatives to mitigate the impact of climate change on women. This should include applying a gender-responsive approach to introducing CSA-sensitive practices.

Current situation

- Traditional gender norms coupled with low skills restrict women to lower-paid and lower-skilled roles and sectors.
- Skills gaps in key sectors - especially in rural areas.
- Gaps in education to work transition especially in STEM subjects; while 22% of computer science graduates are women, only 2.9% of them receive jobs in the field of technology.
- Historical triple marginalisation of Black African women on the basis of class, race and sex has resulted in very few Black African women gaining access to higher education.
- Female-headed households are more likely to live in poverty.
- 8.3% of women are living with some form of disability, and experience economic and social marginalisation.

3. Work with women and girls holistically to improve their human capital and wellbeing.

Recommended strategies for consideration include:

- Ensure education to employment pathways for adolescent girls and young women are clearly determined - moving from secondary education towards accessing higher/tertiary education opportunities.

- Leverage and strengthen TVET efforts which target women with market-orientated skills.
- Target Black African women, female-headed households and other marginalised groups including women with disabilities.
- Leverage and build on existing policies and programmes to increase girls' and young women's engagement in STEM subjects and professional skills development, by focusing on the education to work transition.
- Include efforts to improve soft skills around leadership, negotiation and conflict management, through on-the-job training and mentoring schemes.
- Improve female entrepreneurs' business capabilities and financial literacy.
- Focused interventions to move women up value chains and into more lucrative, higher- skilled and secure sectors.
- Targeted interventions to improve women's voice, decision-making and self-efficacy; more equitable norms around leadership, and opportunities for women to move into new or upgraded roles.
- Provide or link women and young people with improved SRHR services.

Current situation

- Barriers for women include entrenched traditional attitudes towards women in the workplace, gender-discriminatory workplace cultures, and lack of provisions or allowances for women's family and social roles (such as flexible working or sufficient childcare provisions).
- Nearly 77% of women in South Africa have reported experiencing some form of workplace sexual harassment.
- Gender pay gap and limited women in leadership positions.

4. Work with large employers to promote gender-sensitive and safe workplaces.

Recommended interventions for consideration include:

- Strengthen organisational internal gender capacity to improve gender-related knowledge, attitudes, skills of staff, and enhance institutional policies and practices.
- Promote use of gender and GBV risk assessment tools and work with companies to assess risks and put in place evidence-based mitigation measures.
- Workplace empowerment programmes that improve women's health knowledge and access to goods and services, e.g. SRHR literacy, access to affordable contraception and menstrual health

products, as well as financial literacy, and training addressing both hard and soft skills.

- Endorse and implement gender commitments, which should include gender-sensitive policies, staff training, codes of conduct, GBVH policies, and anonymous grievance and reporting mechanisms.
- Focus on addressing gender-based violence and harassment, promoting zero tolerance, and address indifference towards women unpaid care responsibilities ensuring safe and effective reporting mechanisms and referral pathways for survivors of violence.
- Improve working conditions and health and safety for women workers including provision of living wage, addressing any gender pay gap, flexible working hours and parental leave.
- Implement policies to proactively procure from women suppliers and women-owned businesses.

Current situation

- At the household level, men continue to dominate decisions around employment income and opportunities
- Over one in five women aged 18-50 years (21.3%) have experienced physical or sexual violence by an intimate partner in their lifetime.

5. Address inequitable intra-household dynamics, norms and gender-based violence.

Recommended strategies for consideration include:

- Cooperatives, VSLAs and other socioeconomic interventions should consider household approaches which explicitly stimulate discussions, promote gender-equitable attitudes and norms and support families to negotiate about gender roles and norms which guide intra-household decision-making and division of labour.
- Support livelihoods and economic empowerment initiatives coupled with gender-transformative interventions. This should be aimed at increasing women's access to and control over economic assets and access to financial services, promote their financial independence, reduce their vulnerability to economic and other forms of gender-based violence, and support women's ability to access services independently. This should be integrated with interventions to transform harmful masculinity and its consequences.
- Build on existing efforts to improve understanding of what works to increase women's access to and control over land and other assets.

6.3 Research, monitoring and evaluation recommendations

Current situation

- Limited information and evidence on the impact of existing WEE and youth employment programmes.
- Evidence gaps around how different gender-related challenges including gender-based violence play out in different sectors.
- Limited evidence on economic violence against women.
- Limited evidence about and research with the most marginalised women including Black African women, women with disabilities, young women and migrants.
- Insufficient evidence of what works to economically empower women in South Africa.
- Presence of patriarchal norms and high levels of gender-based violence. This means that initiatives which lead to a change in these norms may lead to backlash, including increased gender-based violence.

1. Commission and undertake research and evaluations to address research gaps including:

- Studies to understand the impact of existing programmes (such as TWIB and WECP as well as youth employment initiatives) on WEE outcomes;
- Research to understand women's experiences of gender-based violence and harassment in the workplace, as well as successful mitigating actions;
- Research on prevalence and dynamics of economic violence against women, and action research to understand what works to address it;
- Research to understand barriers faced by the most marginalised groups of women including Black African women, women with disabilities and migrants;
- Undertake research and survey efforts to draw clear and meaningful insights on women's time use and unpaid domestic and care work.

2. Include measures of key factors enabling or constraining women's economic empowerment including gender-specific measures focused on women's capabilities and agency, household relations and gender norms and attitudes. This should also include tracking signs of potential backlash including increased rates of intimate partner violence.

3. **Disaggregate results by sex** and include disaggregated targets. Wherever possible, programmes and research should further disaggregate by other socioeconomic characteristics including income, age, race, disability, migratory status and geographic location. Ideally, this should entail the integration of gender statistics in all national surveys including the recognition of qualitative data. The aim of this is to improve policy action based on robust gender statistics.
4. **Commission mixed-method research and evaluations** on these issues to understand how and why change happens, and to better understand women's lived realities through participatory qualitative research and theory-based evaluations.
5. Support participatory qualitative research to enable women to tell their own stories in order to better understand women's lived realities and propose more context-cognisant, non-linear and tailored solutions.⁴⁶⁴
6. **Monitor, track and mitigate against any signs of potential backlash** during programme implementation, including increased rates of violence against women.

464 Haruna, Z. (2021)

Appendices

Appendix 1 - Explanation of methodology

Scoping study

A scoping study was implemented to guide research fundamentals

Euromonitor International undertook preliminary research to analyse the existing literature on women's economic empowerment in the 13 countries, identify research and data gaps to help develop research objectives/questions and guide the methodology design of the Pathways Study.

Multiple drivers and barriers to women's economic empowerment exist, and the initial scoping research helped identify key commonalities as well as underlying differences across sectors and countries. In agriculture, the role of women within local governance and resource control/distribution structures is critical to success, and cooperatives/collectives have been effective at increasing women's economic outcomes and agency. In non-agriculture sectors, employment segregation and unpaid care work, both usually driven by gender norms,

are key barriers relegating women to certain roles and/or restraining women from certain sectors and/or to lower-paying positions/occupations within sectors.

Additionally, while national institutions are often tasked with addressing women's economic empowerment broadly, local entities and sector-specific organisations are better placed to implement meaningful changes/localised solutions that expand women's economic opportunities in a sustainable way.

Sample findings from scoping study

Shared barriers across SSA		Country-level barriers
Employment concentration in informal, low-wage and low-skilled sectors	Inadequate access to financial institutions and affordable credit facilities	 High fertility/adolescent fertility rates
Employment concentration in administrative positions, low representation in managerial positions	Under-investment in education beyond baseline and primary levels	 Inadequate access to reproductive health/family planning needs
Broad wage gap in both formal and informal sectors	Imbalanced household power dynamics/sociocultural barriers on gender roles	 Low life expectancy/high maternal mortality rates
Under-representation in key growth sectors	Significant time spent on unpaid care work and domestic household chores	 Inadequate access to safe transport
Education and employment discrimination that contributes to employment segregation	Gender norms that limit women's opportunities	

Employment
 Access to resources
 Social and cultural
 Health and safety

Note: Countries listed under the 'country-level barriers' reflect SSA countries (within the scope of the Pathways Study) that experience the highest levels of the listed WEE health-related barriers. These include:

- High fertility/adolescent fertility rates: Angola, Cote d'Ivoire, Nigeria, Senegal, Tanzania & Uganda
- Inadequate access to reproductive health/family planning needs: Angola, Cote d'Ivoire, Ghana, Nigeria, Senegal & Uganda
- Low life expectancy/high maternal mortality rates: Cameroon, Cote d'Ivoire & Nigeria
- Inadequate access to safe transport: Ethiopia, Rwanda, Tanzania & Uganda

Sector selection

In executing the first key objective of the Pathways Study research programme (“identifying sectors with the most potential to contribute to and benefit from expanding women’s opportunities”), Euromonitor International considered the level of these opportunities, both in terms of potential/scope (reaching the majority of women across the country) and in terms of feasibility (ease with which to expand opportunities). Quantitative and qualitative methods were utilised to ensure a balanced perspective on the sector selection.

Focusing on priority sectors, using economic modelling to tease out the data/quantitative story for women’s economic empowerment

The United Nation’s globally recognised International Standard Industrial Classification of Economic Activities (ISIC Rev. 4)⁴⁶⁵ was utilised for the definition of sectors. In order to ensure full alignment with other data sources (including Euromonitor International’s proprietary Passport database from which other data was sourced), the ISIC’s 21 categories/sectors were consolidated into 14 overall sectors (please refer to Appendix 2 for full definitions).⁴⁶⁶ Euromonitor International’s Analytics team analysed historic and current data available at

a country level on the main economic sectors. The team developed forecasts for productivity, employment and women’s economic potential in each economic sector. This modelling used variables including Gross Value Added (GVA) at sector level, Gross Domestic Product (GDP), Employment Data, Capital Data, Demographics Data, sourced from Passport (Euromonitor International’s Passport database). The analysis also incorporated data from the International Labour Organization statistical database (ILOSTAT⁴⁶⁷): (i) Employment Data by sex and economic activity; and (ii) Mean weekly hours worked per person by sex and economic activity. The African Development Bank Group (AfDB) database⁴⁶⁸ provided additional input on: (i) GVA from Education, Human Health and Social Work Activities - for Angola, Botswana and South Africa; and (ii) Gross Capital Formation per public/private sector. These metrics were utilised in a model to predict the GVA share from GDP using fixed effect panel data regression. The metrics were also used in another model to assess the benefit of women’s inclusion per sector (using a Cobb-Douglas production function with labour disaggregated by gender).⁴⁶⁹

Euromonitor International then developed these findings into a visual scorecard that ranks sectors based on three scenarios: (i) sector performance; (ii) labour opportunity and productivity; and (iii) gender labour gap.

⁴⁶⁵ See https://unstats.un.org/unsd/publication/seriesm/seriesm_4rev4e.pdf ⁴⁶⁶ In South Africa, instead of 14 sectors, a total of 12 sectors aligning with the country’s national sector classification were analysed. ⁴⁶⁷ <https://ilostat.ilo.org/> ⁴⁶⁸ <https://dataportal.opendataforafrica.org/> ⁴⁶⁹ The methodology was adjusted based on earlier work by Espinoza, Raphael and Ostry, Jonathan D. and Papageorgiou, Chris, *The Armistice of the Sexes: Gender Complementarities in the Production Function* (June 2019). CEPR Discussion Paper No. DP13792, Available at SSRN: <https://ssrn.com/abstract=3428312>

Scorecard scenarios for ranking economic sectors

Scenario 1:		Scenario 2:		Scenario 3:	
<p>Women's opportunities rest mainly on the sectors' performance: Women will benefit from huge increase of GVA in the most dominant sectors.</p>		<p>Women's opportunities rest mainly on labour performances: Women will benefit from huge increase of labour force and sector productivity.</p>		<p>Women's opportunities rest mainly on the current gender gap: Women can win in sectors where gender gap is high and sectors will highly benefit from female inclusion.</p>	
Rank	Sectors	Rank	Sectors	Rank	Sectors
1	Public Administration And Defence; Compulsory Social Security	1	Wholesale And Retail Trade; Repair of Motor Vehicles And Motorcycles	1	Public Administration And Defence; Compulsory Social Security
2	Wholesale And Retail Trade; Repair of Motor Vehicles And Motorcycles	2	Public Administration And Defence; Compulsory Social Security	2	Wholesale And Retail Trade; Repair of Motor Vehicles And Motorcycles
3	Manufacturing	3	Manufacturing	3	Real Estate Business And Administrative Activities
4	Mining And Quarrying	4	Real Estate Business And Administrative Activities	4	Financial And Insurance Activities
5	Real Estate Business And Administrative Activities	5	Mining And Quarrying	5	Manufacturing
6	Financial And Insurance Activities	6	Utilities	6	Transport Storage And Communication
7	Transport Storage And Communication	7	Financial And Insurance Activities	7	Construction
8	Utilities	8	Transport Storage And Communication	8	Mining And Quarrying
9	Other Services	9	Other Services	9	Other Services
10	Construction	10	Construction	10	Utilities
11	Agriculture, Forestry And Fishing	11	Agriculture, Forestry And Fishing	11	Accommodation And Food Service Activities
12	Accommodation And Food Service Activities	12	Accommodation And Food Service Activities	12	Agriculture, Forestry And Fishing

The scorecard was shared with country working group participants through workshop sessions to ensure that sector selections reflected inputs from country-level stakeholders

In order to ensure a balanced approach to choosing the sectors of focus, Euromonitor International organised “sector selection” workshops per country to discuss the findings from the scoping study and scorecard.⁴⁷⁰

Leveraging Steering Committee and partner networks, participants/stakeholders from the private and public sectors of the country were invited to share their feedback on the scorecard sectors and to provide input on sectors/sub-sectors of focus. Country stakeholders' knowledge and experience were incorporated to ensure that the selection of the sectors was contextually cognisant, while considering the informal economy and the socioeconomic, political and cultural factors

⁴⁷⁰ These “sector selection” workshops for the Pathways Study occurred between December 2020 and February 2021

that are likely to drive women opportunities. Noteworthy is that the sectors proposed by participants were mostly aligned with the scorecard findings.

Euromonitor International then conducted additional secondary research to validate the sectors proposed during the workshop in order to develop a matrix of criteria and

considerations (see below) to support the final selection of three broad sectors in South Africa: (i) the manufacturing sector (clothing, textiles, footwear and leather (CTFL)); (ii) the real estate sector (development/construction and property management/agency services); and (iii) the wholesale and retail trade (WRT) sector.

Selection Criteria Deep Dive: South Africa

Broad Economic Sector	Specific Sectors/ Commodities (if applicable)	Criteria fulfilled (checklist)						Criteria fulfilled (explanation)	Considerations met & Explanation	Potential Challenges (conducting research in sector + sector-specific)
		1	2	3	4	5	6			
Manufacturing	Clothing, Textiles, Footwear and Leather – CTFL	✓	✓	✓		✓	✓	Manufacturing ranked 3rd in scorecard for scenarios 1 and 2, and 5th in scenario 3. Pattern design/manufacturing, leather and footwear.	Both local and export opportunities. Manufacturing sector is under pressure from imports. Opportunities are identified mainly in Kwa-Zulu Natal and Western Cape provinces.	Highly competitive. Manufacturing sector is under pressure from imported goods.
Wholesale and retail trade	Logistics & Supply Chain	✓	✓	✓			✓	High opportunity sector in scorecard. There is potential for small/medium enterprises in supply chain service provision.	The informal retail/trade sector is a major source for income for women throughout the country.	Stiff competition, especially against large enterprises with fleets.
Real Estate	Development/ Construction & Property Management/ Agency Services		✓	✓	✓	✓	✓	High opportunity sector in scorecard. High profits were recorded in this sector (along with legal services/business consultancy).	Perceived as an area where female entrepreneurs and women-owned enterprises can achieve progress.	Market conditions are poor. Highly dependent on demand and economic performance. Undermined by poor economic conditions.

Criteria

- 1. Incorporating informal economy
- 2. Ability to effect change
- 3. Women’s preferences & agency
- 4. Alignment with govt strategy/national devpt plan
- 5. Timescale of intended impact + sector potential
- 6. Scorecard priority

Interviewee Type	Clothing, Textiles, Footwear and Leather (CTFL)	Real Estate	Wholesale and Retail Trade (WRT)
Non-Profits and Non-Governmental Organisations (National and Global)	1		1
Government Bodies/Agencies	5	2	3
Professional Groups/	3	-	-
Industry Associations	-	4	1
Private Companies/ Organisations	3	8	1
Industry Media Body	-	1	-
Academia (Universities)	-	2	-
Total	9	17	6

Stakeholder mapping

The research team identified key WEE stakeholders in relevant sectors mainly via desk research and supplemented with interviews. The research team then mapped these stakeholders per location (province) in the country

The research team (Euromonitor International and country research partners) used desk research and targeted outreach and interviews to identify and map key stakeholders playing a key role in women's economic empowerment within each sector. The objective of this mapping was twofold: (i) to identify key stakeholders - public and private per sector in each country, their operations within the supply/value chain, key projects/initiatives, any key provisions for women (e.g. membership, leadership, gender-focused programmes, etc.) and their impact on women's economic empowerment; and

(ii) to identify potential stakeholders to be interviewed for the Pathways Study.

This mapping produced 200+ stakeholders in South Africa across the three broad sectors:

(i) the manufacturing sector (clothing, textiles, footwear and leather (CTFL)); (ii) the real estate sector (development/construction and property management/agency services); and (iii) the wholesale and retail trade (WRT) sector. These stakeholders included: (i) sectoral structures (associations, cooperatives and collectives, organisations and representative bodies); (ii) government ministries, departments and agencies; (iii) private companies; and (iv) non-governmental organisations - NGOs (international and country). Please refer to the Pathways Study website for the full mapping of stakeholders.⁴⁷¹

⁴⁷¹ Stakeholder listing is based on secondary research and interviews, so all stakeholders (especially those with highly localised and/or offline operations) may not have been captured in the listing. All maps and tables present best-available information and can be updated as new information is received.

Interviews

The research team conducted interviews with key stakeholders to dive into women's roles per sector, including the drivers and challenges faced and future opportunities

The research team for South Africa conducted a total of 32 in-depth interviews with stakeholders including cooperatives/collectives, industry associations, NGOs/INGOs and civil society organisations, private companies and public entities. The objective was to discuss women's participation in the sub-sectors in South Africa, the key drivers/barriers to expanding women's opportunities and the actionable steps to getting there. The questions were structured into three broad themes/objectives (examples of broad topics discussed per theme below):

1. Sector/Sub-sector overview and trends

- What are the sector's drivers and constraints - generally and for women specifically?
- How does the sector provide opportunities for achieving sustainable employment and/or sustainable livelihoods?

2. Current status of women in sector/sub-sector

- What types of positions/jobs do women hold (formal and informal)? Why?
- What are the drivers of and barriers to women's (increased) economic participation in the sector/sub-sector

(employment, entrepreneurship, career advancement etc.)?

3. Future opportunities for women in the sector/sub-sector and actionable solutions

- What type of roles/positions/jobs/opportunities (including self-employment) can women target? How? What is needed to support them?
- What are the current solutions being implemented?
- Are there any other solutions not yet being implemented that may improve women's economic participation in the sector?
- Who are specific key stakeholders crucial to implementing identified solutions?

Analysis and reporting

Findings from primary and secondary sources were analysed and developed into a report (including actionable recommendations) that was reviewed by multiple stakeholders/partners

The research team then analysed data and insights collected from secondary and primary research to produce key findings and proposals to improve women's economic opportunities. Key drivers and barriers plus preliminary recommendations were then developed for discussion/elaboration with country working group participants in a "developing recommendations" workshop

facilitated by Euromonitor International.⁴⁷² This was in order to integrate their expertise and knowledge of the country's context into the analysis, to ensure the final recommendations are tailored, relevant and feasible for women in the country.

Feedback from country working group participants was then incorporated ahead of sharing the draft reports with key stakeholders (sector experts, thematic experts, Pathways Study Steering Committee) for validation, and working with Kore Global for finalisation.

Appendix 2 - Sector classification⁴⁷³

Overall sectors based on International Standard Industrial Classification of Economic Activities (ISIC Rev. 4)

#	Sector Name	Description
1	Accommodation and Food Service Activities	This category corresponds to Section I of the International Standard Industrial Classification (ISIC Rev. 4) and comprises units providing customers with short-term lodging and/or preparing meals, snacks and beverages for immediate consumption. The section includes both accommodation and food services because the two activities are often combined at the same unit.
2	Agriculture, Forestry and Fishing	This category corresponds to Section A of the International Standard Industrial Classification (ISIC Rev. 4) and covers the exploitation of vegetal, animal and fish natural resources. The section comprises the activities of growing crops, raising animals, harvesting timber and harvesting other plants and animals from a farm or their natural habitats. Fishing is defined as the use of fishery resources from marine or freshwater environments, with the goal of capturing or gathering fish, crustaceans, molluscs and other marine products (e.g. pearls, sponges, etc.).
3	Construction	This category corresponds to Section F of the International Standard Industrial Classification (ISIC Rev. 4) and includes general construction and special trade construction for buildings and civil engineering, building installation and building completion. It includes new work, repair, additions and alterations, the erection of prefabricated buildings or structures on the site and also construction of a temporary nature.

⁴⁷² These "developing recommendations" workshops for the Pathways Study occurred between March 2021 and June 2021

⁴⁷³ This is a definitions summary of all 14 sectors analysed in developing the scorecard for the 13 countries. However, the broad sectors of focus per country are limited to two to three, with a deep dive analysis of sub-sectors and/or agricultural commodities

Overall sectors based on International Standard Industrial Classification of Economic Activities (ISIC Rev. 4)

#	Sector Name	Description
4	Education	This category corresponds to Section P of the International Standard Industrial Classification (ISIC Rev. 4) and includes public as well as private education at any level or for any profession, oral or written as well as by radio and television or other means of communication. It includes education by the different institutions in the regular school system at its different levels as well as adult education, literacy programmes, etc. Also included are military schools and academies, prison schools, etc. at their respective levels.
5	Financial and Insurance Activities	This category corresponds to Section K of the International Standard Industrial Classification (ISIC Rev. 4) and comprises units primarily engaged in financial transactions, i.e. transactions involving the creation, liquidation or change of ownership of financial assets. Also included are insurance and pension funding and activities facilitating financial transactions. Units charged with monetary control, the monetary authorities, are included here.
6	Human Health and Social Work Activities	This category corresponds to Section Q of the International Standard Industrial Classification (ISIC Rev. 4) and includes the provision of health care by diagnosis and treatment and the provision of residential care for medical and social reasons, as well as the provision of social assistance, such as counselling, welfare, child protection, community housing and food services, vocational rehabilitation and childcare to those requiring such assistance. Also included is the provision of veterinary services.
7	Manufacturing	This category corresponds to Section C of the International Standard Industrial Classification (ISIC Rev. 4) and includes: manufacture of food, beverages and tobacco; manufacture of textiles, wearing apparel and leather; manufacture of wood and wood products; manufacture of paper and paper products, printing and publishing; manufacture of chemicals and chemical petroleum, coal, rubber and plastic products; manufacture of non-metallic mineral products, except products of petroleum and coal; manufacture of basic metal; manufacture of fabricated metal products; other manufacturing industries.

Overall sectors based on International Standard Industrial Classification of Economic Activities (ISIC Rev. 4)

#	Sector Name	Description
8	Mining and Quarrying	This category corresponds to Section B of the International Standard Industrial Classification (ISIC Rev. 4) and includes the extraction of minerals occurring naturally as solids (coal and ores), liquids (petroleum) or gases (natural gas). Extraction can be achieved by underground or surface mining or well operation.
9	Other Services	This category corresponds to Sections R, S, T and U of the International Standard Industrial Classification (ISIC Rev. 4) and includes services provided by businesses and government units to individuals, other businesses or the community as a whole, activities within households, where the same household is the consumer of the products produced.
10	Public Administration and Defence; Compulsory Social Security	This category corresponds to Section O of the International Standard Industrial Classification (ISIC Rev. 4) and includes activities normally carried out by the public administration. However, the legal or institutional status is not, in itself, the determining factor. This division includes units that are part of local or central public bodies that enable the administration of the community to function properly. The section includes general administration (e.g. executive, legislative, financial administration, etc. at all levels of government) and supervision in the field of social and economic life; defence, justice, police, foreign affairs, etc.; management of compulsory social security schemes.
11	Real Estate Business and Administrative Activities	This category corresponds to Sections M, N and L of the International Standard Industrial Classification (ISIC Rev. 4) and includes activities that focus mainly on the business sector with the obvious exception of real estate activities.

Overall sectors based on International Standard Industrial Classification of Economic Activities (ISIC Rev. 4)

#	Sector Name	Description
12	Transport Storage and Communication	This category corresponds to Section H and J of the International Standard Industrial Classification (ISIC Rev. 4) and includes activities related to providing passenger or freight transport, whether scheduled or not, by rail, pipeline, road, water or air; supporting activities such as terminal and parking facilities, cargo handling, storage, etc.; postal activities and telecommunication; renting of transport equipment with driver or operator.
13	Utilities	This category corresponds to Sections D and E of the International Standard Industrial Classification (ISIC Rev. 4) and covers the activity of providing electric power, natural gas, steam supply, and water supply through a permanent infrastructure (network) of lines, mains and pipes.
14	Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	This category corresponds to Section G of the International Standard Industrial Classification (ISIC Rev. 4) and includes wholesale and retail sale (sale without transformation) of any type of goods and rendering services incidental to the sale of merchandise. Wholesaling and retailing are the final steps in the distribution of merchandise. Also included in this section are the repair of motor vehicles and the installation and repair of personal and household goods.

Appendix 3 - Cross-sectoral summary of barriers and opportunities and entry points

Structural Barriers	CTFL	Real Estate	WRT
Weak and fragmented labour inspection undermines labour rights and working conditions	✓		✓
Limited labour law protection for informal workers	✓	✓	✓
Low wages and limited job security (especially for informal workers)	✓		
Discriminatory wage system		✓	
Health and safety issues	✓	✓	
White- and male-dominated management structures		✓	✓
Gender pay gap	✓	✓	✓

Structural Opportunities and Entry Points	CTFL	Real Estate	WRT
Gender targets in sector-wide plans and objectives	✓		
Government laws and policies promoting representation in employment and procurement	✓	✓	✓
Existing labour laws	✓	✓	
Existence of initiatives to raise standards in the sector	✓		
Active unions and employee associations	✓		
More equitable wage systems	✓	✓	✓

Normative Barriers	CTFL	Real Estate	WRT
Gender-based violence and harassment (GBVH) and intimate partner violence (IPV)	✓	✓	✓
Unpaid care and domestic work, especially childcare responsibilities	✓	✓	✓
Gender-based discrimination in the workplace	✓		
Supervisors gender-inequitable attitudes	✓	✓	✓
Gender norms contribute to employment segregation	✓	✓	✓
Norms around women in leadership	✓	✓	✓
Women's contribution to sector undervalued		✓	
Lack of role models		✓	✓
Norms around women and STEM subjects limit engagement in the sector		✓	
Norms around mobility and fears of safety on public transport			✓

Normative Opportunities and Entry Points	CTFL	Real Estate	WRT
Opportunities for women in leadership positions	✓		
Existence of standardised guidelines for addressing gender-based violence in the sector	✓		✓
Work with leadership to change organisational cultures	✓		✓
Interventions aimed at reducing women's unpaid care burden and redistribution of household care and domestic responsibilities	✓	✓	✓
Flexible working conditions offered by certain jobs and income-earning activities.	✓	✓	✓
Minimum wages			✓
Industry actors targeting women and youth with skills and development opportunities			✓

Individual Barriers	CTFL	Real Estate	WRT
Constrained educational attainment and skills gaps including business skills	✓	✓	✓
Limited access to financial capital	✓	✓	✓
Weak social capital	✓	✓	
Inadequate provision of sexual reproductive and health rights (SRHR)	✓		✓
Gender inequities in land ownership		✓	
Lack of awareness and information on available schemes and job opportunities for women in the sector	✓	✓	✓

Individual Opportunities and Entry Points	CTFL	Real Estate	WRT
Holistic skills building programmes (including in the workplace)	✓	✓	✓
Improving women entrepreneurs' access to financial capital and skills	✓	✓	✓
Health care provisions in the workplace (including SRH services)	✓		✓
Raising women's visibility in the sector		✓	
Improving access to training and networks		✓	
Improving the education to work transition	✓	✓	✓

Bibliography

3SMedia. (2020). 48% of South Africa's construction companies are owned by women | Infrastructure news. <https://infrastructurenews.co.za/2020/08/14/48-of-south-africas-construction-companies-are-owned-by-women/>

African Development Bank (AfDB) (2019). South Africa - The National Gender Machinery, Gender Mainstreaming and the Fight against Gender Based Violence. 42. <https://www.afdb.org/fileadmin/uploads/afdb/Documents/Project-and-Operations/South%20Africa%20-%20The%20National%20Gender%20Machinery%20Gender%20Mainstreaming.pdf>

African Development Bank (AfDB) & UN ECA (2019). Africa Gender Index Report 2019. <https://www.afdb.org/en/documents/africa-gender-index-report-2019-analytical-report>

Africa Health Organisation. (14 January 2021). Gender-Based Violence Fact Sheet: South Africa. Africa Health Organisation. <https://www.aho.org/news/gender-based-violence-fact-sheet-south-africa/>

Akala, B. (2018). Challenging gender equality in South African transformation policies - a case of the White Paper: A programme for the transformation of higher education. South African Journal of Higher Education. 32(3). 10.20853/32-3-1521. <https://www.journals.ac.za/index.php/sajhe/article/view/1521/1801>

Akala, B. (2019). Girls still face education barriers in Kenya and South Africa - Quartz Africa. <https://qz.com/africa/1742853/girls-still-face-education-barriers-in-kenya-and-south-africa/>

Allen (2020). Women to receive 40% of public procurement projects Chartered Institute of Procurement and Supply (CIPS). Accessed 15 August 2022. <https://www.cips.org/supply-management/news/2020/august/women-to-receive-40-public-procurement-projects/>

Amnesty International. (9 February 2021). Southern Africa: Homes become dangerous place for women and girls during COVID-19 lockdown. Amnesty International. <https://www.amnesty.org/en/latest/news/2021/02/southern-africa-homes-become-dangerous-place-for-women-and-girls-during-covid19-lockdown/>

Arab News. (24 August 2020). South Africa retail industry feels pain from coronavirus pandemic. Arab News. <https://arab.news/6hgnc>

Bamu-Chipunza, P. (2018). Extending Occupational Health and Safety Law to Informal Workers: The Case of Street Vendors in South Africa. Oxford Human Rights Hub. <https://ohrh.law.ox.ac.uk/wp-content/uploads/2021/04/3-OHS-to-Informal-Workers.pdf>

Batista, C., Siqueira, S., Vicente, P. (2021). Closing the Gender Profit Gap. CEPR Discussion Paper No. DP15916. March. https://papers.ssrn.com/sol3/papers.cfm?abstract_id=3803152

Benjamin, N. (2017). How far have we come in Promoting Working Women's Rights to Gender Equality and Decent Work? 8. <https://www.lrs.org.za/wp-content/uploads/2021/01/How-far-have-we-come-in-Promoting-Working-Womens-Rights-to-Gender-Equality-and-Decent-Work.pdf>

- Bertelsmann Stiftung. (2020). Country_report_2020_ZAF.pdf.
https://bti-project.org/fileadmin/api/content/en/downloads/reports/country_report_2020_ZAF.pdf
- Bezuidenhout, A., & Jeppesen, S. (2011). Between market, state and society: Labour codes of conduct in the southern African garment industry. *Development Southern Africa - DEV SOUTH AFR*, 28, 653–668.
<https://doi.org/10.1080/0376835X.2011.623923>
- Bloomberg. (2020a). South Africans baffled by bizarre lockdown clothing rules.
<https://businesstech.co.za/news/business/397591/south-africans-baffled-by-bizarre-lockdown-clothing-rules/>
- Bloomberg. (3 March 2020b). Nigeria Tops South Africa as the Continent's Biggest Economy. Bloomberg.Com.
<https://www.bloomberg.com/news/articles/2020-03-03/nigeria-now-tops-south-africa-as-the-continent-s-biggest-economy>
- BSR. (2017). BSR_Womens_Empowerment_Africa_Apparel_Brief.pdf.
https://www.bsr.org/reports/BSR_Womens_Empowerment_Africa_Apparel_Brief.pdf
- Buhlungu, S., & Tshoaedi, M. (Eds.). (2013). COSATU's contested legacy: South African trade unions in the second decade of democracy. Brill. <https://www.hsrbpress.ac.za/books/cosatus-contested-legacy>
- Business & Human Rights Resource Center. (n.d.). So. Africa: Three million South Africans have lost their jobs as a result of the Covid-19 pandemic, women most affected. Business & Human Rights Resource Centre. Retrieved 3 June 2022, from <https://www.business-humanrights.org/en/latest-news/so-africa-three-million-south-africans-have-lost-their-jobs-as-a-result-of-the-covid-19-pandemic-women-most-affected/>
- Business Fights Poverty. (n.d.). BFP-GBV-Declaration.pdf. Retrieved 3 June 2022, from <https://primark.a.bigcontent.io/v1/static/BFP-GBV-Declaration>
- Business Insider. (2021). 5 signs that SA economy isn't dead yet - In fact, it's doing better than expected | Businessinsider. Retrieved 3 June 2022, from <https://www.businessinsider.co.za/signs-of-life-in-south-african-economy-2021-2>
- Calder R., et al (2020). Measurement of women's economic empowerment. An FCDO Guidance Note. London, UK. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/895765/Guidance-Measurement-Womans-Economic-Empowerment2.pdf
- Calder R., et al. (2021). Women informal entrepreneurs in Kenya: a feminist analysis of economic empowerment challenges and opportunities. https://med.stanford.edu/content/dam/sm/gender-equality/documents/Women%20Informal%20Entrepreneurs%20in%20Kenya_October%202021.pdf
- Calder, R., & Boost, E. (2020) Unpublished. "Gendered Life Stages and Financial Inclusion Literature Review". Ideo.org.
- Cape Clothing and Textile Cluster. (n.d.). About CCTC | Cape Clothing and Textile Cluster. Retrieved 3 June 2022, from <https://capeclothingcluster.org.za/about-cctc/>

- CDC. (n.d.). EXT_Construction-and-Real-Estate-Sector.pdf. Retrieved 4 June 2022, from https://gendertoolkit.bii.co.uk/wp-content/uploads/2020/11/EXT_Construction-and-Real-Estate-Sector.pdf
- Chilenga, T. J. (2017). Practicalities of the National Development Plan: Prospects and challenges, using the rural economy as a case study. *South African Review of Sociology*, 48(2), 87-105. <https://doi.org/10.1080/21528586.2017.1289478>
- Chitiga, M., Henseler, M., Mabugu, R. E., & Maisonnave, H. (2021). How COVID-19 Pandemic Worsens the Economic Situation of Women in South Africa. *The European Journal of Development Research*. <https://doi.org/10.1057/s41287-021-00441-w>
- Claassen, A. (n.d.). Maternity Leave | Labour Guide. Retrieved 3 June 2022, from <https://www.labourguide.co.za/conditions-of-employment/452-maternity-leave>
- Clark, L. (2021). Powering Households and Empowering Women: The Gendered Effects of Electrification in sub-Saharan Africa. *Journal of Public and International Affairs*. <https://jpia.princeton.edu/news/powering-households-and-empowering-women-gendered-effects-electrification-sub-saharan-africa>
- Climate Links. (n.d.-a). 2016 CRM Fact Sheet - Southern Africa.pdf. Retrieved 2 June 2022, from <https://www.climatelinks.org/sites/default/files/asset/document/2016%20CRM%20Fact%20Sheet%20-%20Southern%20Africa.pdf>
- Climate Links. (n.d.-b). South Africa. Retrieved 2 June 2022, from <https://www.climatelinks.org/countries/south-africa>
- Commission for Gender Equality. CGE (n.d.). Commission for Gender Equality (CGE) - Overview. Retrieved 3 June 2022, from <https://nationalgovernment.co.za/units/view/52/commission-for-gender-equality-cge>
- Competition Commission. (2019). GRMI-Non-Confidential-Report.pdf. <https://www.compcom.co.za/wp-content/uploads/2019/12/GRMI-Non-Confidential-Report.pdf>
- Construction Industry Development Board (CIDB). (16 April 2021a). Our Construction Mandate | cidb. <https://www.cidb.org.za/about-us/our-construction-mandate/>
- Construction Industry Development Board (CIDB). (21 April 2021b). Register of Contractors Overview | cidb. <https://www.cidb.org.za/contractors/register-of-contractors/overview/>
- COSATU. (n.d.). COSATU - Congress of South African Trade Unions. Retrieved 3 June 2022, from <http://www.cosatu.org.za/>
- Council on Foreign Relations. (n.d.). Top and Bottom Countries in Women's Workplace Equality. Council on Foreign Relations. Retrieved 2 June 2022, from <https://www.cfr.org/legal-barriers/country-rankings>
- Das Nair, R., & Chisoro, S. (2017). The expansion of regional supermarket chains: Implications on suppliers in Botswana and South Africa. <https://doi.org/10.35188/UNU-WIDER/2017/250-2>

Deedat, H. (2022). A report on the working and living conditions of workers in the clothing and retail sector in South Africa. Compiled by Hamedata Deedat. WageIndicator Subsite Collection. <https://alrei.org/education/a-report-on-the-working-and-living-conditions-of-workers-in-the-clothing-and-retail-sector-in-south-africa-compiled-by-hamedata-deedat>

Department: Mineral Resources and Energy. (n.d.). 2021-2025-WEGE-Strategy-for-the-Energy-Sector.pdf. Retrieved 3 June 2022, from <http://www.energy.gov.za/files/PPMO/2021-2025-WEGE-Strategy-for-the-Energy-Sector.pdf>

Department of Higher Education & Training. (2015). Signed_Copy_of_Sector_Skills_Plan.pdf. https://www.wrseta.org.za/sites/default/files/2020-01/Signed_Copy_of_Sector_Skills_Plan.pdf

Department of Higher Education and Training (2021) Services SETA, 2020/2021 Annual Report https://www.servicesseta.org.za/public/uploads/document/Services%20SETA%20Annual%20Report%202020%202021_9.pdf

Department of Human Settlements. (n.d.). Strat2020.pdf. Retrieved 4 June 2022, from <https://www.kzndhs.gov.za/Uploads/Strat2020.pdf>

Department of Labour. (n.d.). 28424.pdf. Retrieved 4 June 2022, from https://www.gov.za/sites/default/files/gcis_document/201409/28424.pdf

Department of Planning, Monitoring and Evaluation. (n.d.). DPME_Annual Performance Plan_2021_2022.pdf. Retrieved 3 June 2022, from https://www.dpme.gov.za/publications/Strategic%20Plan%20and%20Annual%20Reports/DPME_Annual%20Performance%20Plan_2021_2022.pdf

Department of Small Business Development (2022) Department Of Small Business Development Annual

Performance Plan 2022/2023. http://www.dsbd.gov.za/sites/default/files/2022-05/DSBD%202022-23%20APP%20Final_1.pdf

Department of Trade and Competition. (n.d.). Broad-Based Black Economic Empowerment - The Department of Trade Industry and Competition. Retrieved 3 June 2022, from <http://www.thedtic.gov.za/financial-and-non-financial-support/b-bbee/broad-based-black-economic-empowerment/>

Department for Trade and Industry (2014). National Industrial Policy Framework http://www.thedtic.gov.za/wp-content/uploads/NIPF_r2.pdf

Department of Trade and Industry (DTI) & InvestSA. (2020). FACT-SHEET_TEXTILES_2020.pdf. https://nwdc.co.za/wp-content/uploads/2020/08/FACT-SHEET_TEXTILES_2020.pdf

Department of Trade, Industry and Competition (DTIC) (2020) South African R-CTFL Value Chain Master Plan to 2030 http://www.thedtic.gov.za/wp-content/uploads/Masterplan-CTFL_Value_Chain.pdf

Department of Women. (n.d.). Department-of-Women-Strategic-Plan.pdf. Retrieved 3 June 2022, from <http://www.women.gov.za/images/Department-of-Women---Strategic-Plan.pdf>

- Department of Women, Youth & Persons with Disabilities. (n.d.). Final-National-Beijing-25-Report-2014-2019-Abrideged-.pdf. Retrieved June 3, 2022, from <http://www.women.gov.za/images/Final-National-Beijing-25-Report-2014-2019--Abrideged-.pdf>
- Dinkelman, T. (2011). The Effects of Rural Electrification on Employment: New Evidence from South Africa. *American Economic Review*, 101(7), 3078-3108. <https://doi.org/10.1257/aer.101.7.3078>
- Dlamini, G., Shakantu, W., & Kajimo-Shakantu, K. (n.d.). The impact of the construction industry culture on the work - life balance of women employees: A case of South Africa. 12.
- DRDLR (Department of Rural Development and Land Reform). (2018). Land Audit Report: November 2017. Version 2. Phase II: Private Land Ownership by Race, Gender and Nationality. https://www.gov.za/sites/default/files/gcis_document/201802/landauditreport13feb2018.pdf
- DWYPD (2019) Beijing +25, South Africa's Report on the Progress Made on the Implementation of the Beijing Platform for Action 2014-2019. 81. <http://www.women.gov.za/images/Final-National-Beijing-25-Report-2014-2019--Abrideged-.pdf>
- DWYPD. (2020). 25 Year Review 1994 - 2019. Women's Empowerment and Gender Equality in South Africa. Pretoria, DWYPD. <https://www.dpme.gov.za/publications/20%20Years%20Review/20%20Year%20Review%20Documents/20YR%20Women's%20empowerment%20and%20Gender%20equality.pdf>
- Ellis, E. (2020) Gender-based violence is South Africa's second pandemic, says Ramaphosa. Daily Maverick <https://www.dailymaverick.co.za/article/2020-06-18-gender-based-violence-is-south-africas-second-pandemic-says-ramaphosa/>
- Field, E., Jayachandran, S., & Pande, R. (2010). Do Traditional Institutions Constrain Female Entrepreneurship? A Field Experiment on Business Training in India. *The American Economic Review*, 100(2), 125-129. <https://www.aeaweb.org/articles?id=10.1257/aer.100.2.125>
- FinMark Trust (2016) Gender and financial inclusion: Analysis of financial inclusion of women in the SADC Region. August 2016. https://www.researchgate.net/publication/305875551_Gender_and_Financial_Inclusion_Analysis_of_financial_inclusion_of_women_in_the_SADC_region
- Fox, L. & Romero, C. (2017). In the Mind, the Household, or the Market? : Concepts and Measurement of Women's Economic Empowerment. Policy Research Working Paper; No. 8079. World Bank, Washington, DC. © World Bank. <https://openknowledge.worldbank.org/handle/10986/26951> License: CC BY 3.0 IGO.
- FP 2020. (2019). South_Africa_2019_CI_Handout.pdf. https://fp2030.org/sites/default/files/Data-Hub/2019CI/South_Africa_2019_CI_Handout.pdf
- FP&M SETA. (2014). FPM_sub-sector_clothing_textiles_footwear_leather_final.pdf. https://www.fpmseta.org.za/downloads/FPM_sub-sector_clothing_textiles_footwear_leather_final.pdf
- Freedman, J., Crankshaw, T.L., & Mutambara, V. (2020) Sexual and reproductive health of asylum seeking and refugee women in South Africa: understanding the determinants of vulnerability, *Sexual and Reproductive Health Matters*, 28:1, DOI: 10.1080/26410397.2020.1758440

- Galappaththi-Arachchige, H. N., Zulu, S. G., Kleppa, E., Lillebo, K., Qvigstad, E., Ndhlovu, P., Vennervald, B. J., Gundersen, S. G., Kjetland, E. F., & Taylor, M. (2018). Reproductive health problems in rural South African young women: Risk behaviour and risk factors. *Reproductive Health*, 15(1), 138. <https://doi.org/10.1186/s12978-018-0581-9>
- Gallup Inc. (2019). 2019 Global Law and Order Report. Gallup.Com. Retrieved 3 June 2022, from <https://www.gallup.com/analytics/267869/gallup-global-law-order-report-2019.aspx>
- Gardner, D., & Lockwood, K. (2019). Comparing Housing Economic Value Chains in Four African Countries. 32. <http://housingfinanceafrica.org/app/uploads/Comparing-Housing-Economic-VCs-in-Four-African-Countries-March-2019-FINAL.pdf>
- Gilbert, P. (2020). Sub-Saharan Africa still struggling with mobile gender gap. *Connecting Africa*. http://www.connectingafrica.com/author.asp?section_id=761&doc_id=758009
- Group, G. L. (n.d.). International Comparative Legal Guides (United Kingdom) [Text]. International Comparative Legal Guides International Business Reports; Global Legal Group. Retrieved 3 June 2022, from <https://iclg.com/practice-areas/real-estate-laws-and-regulations/south-africa>
- Guvuriro, S., & Booyesen, F. (2021). Family-type public goods and intra-household decision-making by co-resident South African couples. *Review of Development Economics*, 25(3), 1629-1647. <https://doi.org/10.1111/rode.12768>
- Hanmer, L., & Klugman, J. (2016). “Exploring Women’s Agency and Empowerment in Developing Countries: Where Do We Stand?” *Feminist Economics*. 22(1): 237-63. <https://openknowledge.worldbank.org/handle/10986/23536>
- Harrichurran, P., Vermaak, C., Muller, C., & UNU-WIDER. (2021). The influence of household composition on leisure time in South Africa: A gender comparison (29th ed., Vol. 2021). UNU-WIDER. <https://doi.org/10.35188/UNU-WIDER/2021/967-9>
- Haupt, T., & Madikizela, K. (2010). Why do South African women choose careers in construction? *Acta Structilia*, 23. <https://journals.ufs.ac.za/index.php/as/article/view/176>
- Haruna, Z. (2021). In their own words: African women speak <https://blogs.lse.ac.uk/internationaldevelopment/2021/04/28/in-their-own-words-african-women-speak/>
- Helman, R., & Ratele, K. (2016). Everyday (in)equality at home: Complex constructions of gender in South African families. *Global Health Action*, 9, 10.3402/gha.v9.31122. <https://doi.org/10.3402/gha.v9.31122>
- Human Rights Watch. (24 November 2021). South Africa: Broken Promises to Aid Gender-Based Violence Survivors. Human Rights Watch. <https://www.hrw.org/news/2021/11/24/south-africa-broken-promises-aid-gender-based-violence-survivors>
- IMF. (2022). Regional Economic Outlook for Sub-Saharan Africa, April 2022. IMF. Retrieved 3 June 2022, from <https://www.imf.org/en/Publications/REO/SSA/Issues/2022/04/28/regional-economic-outlook-for-sub-saharan-africa-april-2022>

IMF. (n.d.-b). South Africa Looks Toward Inclusive Recovery to Stabilize Debt, Boost Growth. IMF. Retrieved 3 June 2022, from <https://www.imf.org/en/News/Articles/2020/08/03/nao80320-south-africa-looks-toward-inclusive-recovery-to-stabilize-debt-boost-growth>

IMF. (2021). PFM blog: Advancing Gender Responsive Budgeting in South Africa. <https://blog-pfm.imf.org/pfmblog/2021/10/-advancing-gender-responsive-budgeting-in-south-africa-.html>

IndustriAll. (18 December 2020). Union settles tough wage negotiations in the garment sector in South Africa. IndustriALL. <https://www.industriall-union.org/union-settles-tough-wage-negotiations-in-the-garment-sector-in-south-africa>

International Finance Cooperation. (n.d.). Access to Finance for Women in South Africa.pdf. Retrieved 1 June 2022, from <https://www.ifc.org/wps/wcm/connect/dd73ba18-a3fd-4331-bca8-7ef9430a282c/Access%2Bto%2BFinance%2B-%2BWomen%2Bin%2BSouth%2BAfrica.pdf?MOD=AJPERES>

International Finance Cooperation. (2006). Access to Finance for Women Entrepreneurs in South Africa. https://www.ifc.org/wps/wcm/connect/Topics_Ext_Content/IFC_External_Corporate_Site/Sustainability-At-IFC/Publications/Publications_Report_AccessToFinance-SouthAfrica__WCI__1319578196900

International IDEA. (n.d.). South Africa | International IDEA. Retrieved 3 June 2022, from <https://www.idea.int/data-tools/country-view/310/52>

International Labour Organization. (2014). Wcms_300463.pdf. https://www.ilo.org/wcmsp5/groups/public/---ed_dialogue/---sector/documents/publication/wcms_300463.pdf

International Labour Organization. (2021). Wcms_789648.pdf. https://www.ilo.org/wcmsp5/groups/public/---africa/---ro-abidjan/---ilo-pretoria/documents/vacancynotice/wcms_789648.pdf

International Trade Administration. (2021). South Africa - Distribution and Sales Channels. Retrieved 4 June 2022, from <https://www.trade.gov/country-commercial-guides/south-africa-distribution-and-sales-channels>

IQOQO. (2021). A masterplan to revitalise the clothing and textile sector - IQOQO. Retrieved 3 June 2022, from <https://iqoqo.org/a-masterplan-to-revitalise-the-clothing-and-textile-sector/>

Jewkes, R., Gibbs, A., Jama-Shai, N., Willan, S., Misselhorn, A., Mushinga, M., Washington, L., Mbatha, N., & Skiweyiya, Y. (2014). Stepping Stones and Creating Futures Intervention: Shortened interrupted time series evaluation of a behavioural and structural health promotion and violence prevention intervention for young people in informal settlements in Durban, South Africa. *BMC Public Health*, 14(1), 1325. <https://doi.org/10.1186/1471-2458-14-1325>

Kabeer, N. (2021). "Gender equality, inclusive growth and labour markets." In *Women's Economic Empowerment: Insights from Africa and South Asia*. Edited by Kate Grantham, Gillian Dowie and Arjan de Haan. Routledge and International Development Research Centre.

- Kanjere, M. (2019). Female politicians in South Africa - Image and gender discourse. *African Journal of Public Affairs*, 11. <https://journals.co.za/doi/pdf/10.10520/EJC-1563a659c7>
- Kehler, J. (2001). Women and Poverty: The South African Experience. *Journal of International Women's Studies*: 3(1), 14. <https://vc.bridgew.edu/jiws/vol3/iss1/3/>
- Khumalo, S. (n.d.). Op-Ed: A critical look at women's representation in politics and governance in South Africa. Centre for Human Rights. Retrieved 3 June 2022, from <https://www.chr.up.ac.za/opinion-pieces/1801-acriticallook-at-women-s-representation-in-politics-and-governance-in-south-africa>
- Kim, H., Tanser, F., Tomita, A., Vandormael, A., & Cuadros, D. F. (2021). Beyond HIV prevalence: Identifying people living with HIV within underserved areas in South Africa. *BMJ Global Health*, 6(4), e004089. <https://doi.org/10.1136/bmjgh-2020-004089>
- Kirkwood, D. (2018). Gender in South Africa [Working Paper]. World Bank. <https://doi.org/10.1596/30025>
- Kuroda, R., Lopez, M., Sasaki, J., & Settecase, M. (n.d.). THE DIGITAL GENDER GAP. 10. <https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2019/02/Digital-Equity-Policy-Brief-W20-Japan.pdf>
- Leadhome. (2021). Women power and the property industry, National Women's Day 2021. Leadhome Property Search. <https://www.leadhome.co.za/blog/2021/08/10/5176/undefined/search>
- Lipol, L. S. (2015). Quick Response in the Textile Industries. *International Journal of Scientific and Research Publications*, 5(9), <http://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.735.1914&rep=rep1&type=pdf>
- Lutho Vika. (2016). Thesis_com_2016_vika_lutho.pdf. https://open.uct.ac.za/bitstream/handle/11427/22975/thesis_com_2016_vika_lutho.pdf?sequence=1
- LWO. (9 February 2022). National minimum wage 1 March 2022, announced on 9 February 2022. The LWO - Employers Organisation - Werkgewersorganisasie. <https://lwo.co.za/2022/02/09/national-minimum-wage-2022/>
- Mahlakoana, T. (2018). COSATU elects its first female president, Zingiswa Losi. BusinessLIVE. <https://www.businesslive.co.za/bd/national/labour/2018-09-20-cosat-elects-its-first-female-president-zingiswa-losi/>
- Mail & Guardian. (26 July 2019). South African Special Economic Zones Programme. The Mail & Guardian. <https://mg.co.za/article/2019-07-26-00-south-african-special-economic-zones-programme/>
- Makhitha, K. (2017). Independent retailers in South Africa: How do they select their suppliers for survival? *Journal of Contemporary Management*: 14, 25. <https://journals.co.za/doi/pdf/10.10520/EJC-82d2bd554>
- Malgas, B., Khatle, T., & Mason, R. B. (n.d.). Shortage of Retail Management Skills and Employment Equity Strategies: Attracting Women for Permanent Retail Careers in Rural Areas. 18. <http://digitalknowledge.cput.ac.za/bitstream/11189/7772/1/Shortage%20of%20retail%20management%20skills%20and%20employment%20equity.pdf>

- Malgas, B., Mutize, M., & Mason, R. (2020). The South African Retail Sector. https://www.researchgate.net/publication/345626975_THE_SOUTH_AFRICAN_RETAIL_SECTOR
- Maraire, W. (2016). *Maraire_Working Paper 376_2016.pdf*. https://open.uct.ac.za/bitstream/handle/11427/21593/Maraire_Working%20Paper%20376_2016.pdf?sequence=1&isAllowed=y
- Marcus, R. (2021). "Gender, social norms, and women's economic empowerment." In *Women's Economic Empowerment: Insights from Africa and South Asia*. Edited by Kate Grantham, Gillian Dowie and Arjan de Haan. Routledge and International Development Research Centre.
- Mastercard Foundation (2019). *Mastercard Index of Women Entrepreneurs (2019)*. Mastercard. <https://newsroom.mastercard.com/wp-content/uploads/2019/11/Mastercard-Index-of-Women-Entrepreneurs-2019.pdf>
- Mather, N. (2022a). South Africa: Harassment in the Workplace - Employers to take note of their obligations under the new Code of Good Practice. *Bowmans*. <https://www.bowmanslaw.com/insights/employment/south-africa-harassment-in-the-workplace-employers-to-take-note-of-their-obligations-under-the-new-code-of-good-practice/>
- Mather, N. (2022b). South Africa: New earnings threshold and minimum wage to come into effect on 1 March 2022. *Bowmans*. Retrieved 3 June 2022, from <https://www.bowmanslaw.com/insights/employment/south-africa-new-earnings-threshold-and-minimum-wage-to-come-into-effect-on-1-march-2022/>
- Mayisela, N. (2020). #BizTrends2020: Female leadership in SA's property sector needs to be prioritised. *Bizcommunity*. <https://www.bizcommunity.com/Article/196/730/199572.html>
- Maziwisa, M. (2020). Women as candidates in Local Government Elections: What can we learn from the past? *Dullah Omar Institute*. <https://dullahomarinate.org.za/multilevel-govt/local-government-bulletin/archives/volume-15-issue-4-december-2020-1/women-as-candidates-in-local-government-elections-what-can-we-learn-from-the-past>
- McKenzie, D., Woodruff, C., Bjorvatn, K., Bruhn, M., Cai, J., Gonzalez Uribe, J., Quinn, S., Sonobe, T., and Valdivia, M. (2021). "Training Entrepreneurs." *VoxDevLit* 1(2). August 2021.
- Melton, C. (2021). [PDF] Labour & Work Conditions. IN THE SOUTH AFRICAN Construction Industry Status and Recommendations - Free Download PDF. <https://silo.tips/download/labour-work-conditions-in-the-south-african-construction-industry-status-and-rec>
- Migrant & Refugees. (n.d.). *2021-CP-South-Africa.pdf*. Retrieved 1 June 2022, from <https://migrants-refugees.va/it/wp-content/uploads/sites/3/2021/12/2021-CP-South-Africa.pdf>
- Migration Data Portal. (2021). Migration Data in the Southern African Development Community (SADC). Migration Data Portal. Retrieved 1 June 2022, from <https://www.migrationdataportal.org/regional-data-overview/southern-africa>
- Ministry of Trade and Industry. (n.d.). *CTFL-Master-Plan-booklet-v-31-CLEAN-October-2019.pdf*. Retrieved 3 June 2022, from <https://twyng.co.za/wp-content/uploads/2020/06/CTFL-Master-Plan-booklet-v-31-CLEAN-October-2019.pdf>

- Modise, K. (n.d.). SA's second pandemic of 2020: Gender-based violence. Retrieved 3 June 2022, from <https://ewn.co.za/2020/12/29/sa-s-second-pandemic-of-2020-gender-based-violence>
- Molapo, T. (2014). A comparative analysis of the protection of women's labour rights in the apparel industries of the Southern African Customs Union member states of South Africa and Lesotho, under the African Growth and Opportunity Act. 97.
- Moodley, M.S. (2012). An investigation of the role of women in the South African construction industry. University of Johannesburg. https://ujcontent.uj.ac.za/esploro/outputs/graduate/An-investigation-of-the-role-of/9910249807691?institution=27UOJ_INST
- Moodley, L., Kuyoro, M., Holt, T., Leke, A., Madgavkar, A., Krishnan, M., & Akintayo, F. (2019). Advancing women's equality in Africa | McKinsey. <https://www.mckinsey.com/featured-insights/gender-equality/the-power-of-parity-advancing-womens-equality-in-africa>
- Morris, M., Barnes, J., & Kaplan, D. (2021). Value Chains and Industrial Development in South Africa. In A. Oqubay, F. Tregenna, & I. Valodia (Eds.), *The Oxford Handbook of the South African Economy* (pp. 374-395). Oxford University Press. <https://doi.org/10.1093/oxfordhb/9780192894199.013.18>
- Mosomi, J. & UNU-WIDER. (2019). Distributional changes in the gender wage gap in the post-apartheid South African labour market (17th ed., Vol. 2019). UNU-WIDER. <https://doi.org/10.35188/UNU-WIDER/2019/651-7>
- Mukumbang, F.C., Ambe, A.N. & Adebisi, B.O. (2020). Unspoken inequality: how COVID-19 has exacerbated existing vulnerabilities of asylum-seekers, refugees, and undocumented migrants in South Africa. *Int J Equity Health* 19, 141 (2020). <https://doi.org/10.1186/s12939-020-01259-4>
- Mutangadura, G. (2004). G00173.pdf. <https://pubs.iied.org/sites/default/files/pdfs/migrate/G00173.pdf>
- Mwagiru, D. N. (December 2020). Women leaders in business and higher education in Africa. USB. https://www.usb.ac.za/usb_features/women-leaders-in-business-and-higher-education-in-africa-are-they-reaching-the-top/
- Myroniuk, T. W. (2016). Gendered social capital in a Johannesburg township. *Sociological Focus*, 49(3), 231-246. <https://doi.org/10.1080/00380237.2016.1135031>
- Nazneen, S., Hossain, N., & Chopra, D. (2019). "Introduction: contentious women's empowerment in South Asia." *Contemporary South Asia*. 27:4, 457-470. <https://www.tandfonline.com/doi/full/10.1080/09584935.2019.1689922>
- Ndimande, J. H. (2019). Causes for failure of women-owned construction companies in Kwazulu-Natal, South Africa. [Thesis]. <https://researchspace.ukzn.ac.za/handle/10413/18738>
- Neo-Mofokeng, & Mpata, S. (2021). Why women need investor strategies and financial literacy. Graca Machel Trust. <https://gracamacheltrust.org/2021/12/01/why-women-need-investor-strategies-and-financial-literacy/>
- Nordea. (n.d.). ECO-BB_N1_2021_eng_INT.pdf.pdf. Retrieved 3 June 2022, from https://www.nordea.lu/documents/economic-outlook-boutiques-brochure/ECO-BB_N1_2021_eng_INT.pdf

Nwosu, C. O., & Ndinda, C. (2018). Female household headship and poverty in South Africa: An employment-based analysis. *Economic Research Southern Africa (ERSA) Working Paper 761*. 27. https://www.econrsa.org/system/files/publications/working_papers/working_paper_761.pdf

Nyoka, B. N., Eliseeva, I. A., & News. (25 February 2022). Talking about gender-based violence is not enough. *New Frame*. <https://www.newframe.com/talking-about-gender-based-violence-is-not-enough/>

OECD. (2018). *Bridging-the-digital-gender-divide.pdf*. Retrieved 3 June 2022, from <https://www.oecd.org/digital/bridging-the-digital-gender-divide.pdf>

OECD. (2019). *Inequality - Violence against women - OECD Data*. The OECD. <http://data.oecd.org/inequality/violence-against-women.htm>

OHCHR. (n.d.). *Treaty bodies Treaties*. Retrieved 3 June 2022, from https://tbinternet.ohchr.org/_layouts/15/TreatyBodyExternal/Treaty.aspx?CountryID=145&Lang=EN

Okonkwo, N. P. (2019). *Health and safety management and performance among construction contractors in South Africa* [Thesis, Stellenbosch : Stellenbosch University]. <https://scholar.sun.ac.za:443/handle/10019.1/105803>

Osman, F. (2021) *South Africa's efforts to fix traditional courts hit a snag*. *The Conversation*. <https://theconversation.com/south-africas-efforts-to-fix-traditional-courts-hit-a-s snag-162356>

Parliament Budgetary Office (2021) *Social grant performance as at end March 2021*. https://www.parliament.gov.za/storage/app/media/PBO/National_Development_Plan_Analysis/2021/june/03-06-2021/May_2021_Social_Grant_fact_sheet.pdf

Parliamentary Monitoring Group (PMG) 2020 EPWP Conditional Grant compliance challenges <https://pmg.org.za/committee-meeting/31362/>

Porter, G., Murphy, E., Adamu, F., Dayil, P. B., De Lannoy, A., Han, S., Mansour, H., Dungey, C., Ahmad, H., Maskiti, B., S. C., & Van der Weidje, K. (2021). Women's mobility and transport in the peripheries of three African cities: Reflecting on early impacts of COVID-19. *Transport Policy*, 110, 181-190. <https://doi.org/10.1016/j.tranpol.2021.05.025>

PropertyWheel_GLP. (2017). *Black people largely excluded from property sector value chain - Property Wheel*. <https://propertywheel.co.za/2017/06/black-people-largely-excluded-from-property-sector-value-chain/>

PwC. (2021). *Women-in-work-2021-executive-summary.pdf*. <https://www.pwc.co.uk/economic-services/WIWI/women-in-work-2021-executive-summary.pdf>

Relief Web. (2021). *Teen pregnancies in South Africa jump 60% during COVID-19 pandemic - South Africa | ReliefWeb*. Retrieved 3 June 2022, from <https://reliefweb.int/report/south-africa/teen-pregnancies-south-africa-jump-60-during-covid-19-pandemic>

Republic of South Africa (2021). *Public Works and Infrastructure on women empowerment through The Expanded Public Works Programme* <https://www.gov.za/speeches/public-works-and-infrastructure-women-empowerment-through-expanded-public-works-programme>

Research and Markets. (24 March 2021). South Africa Construction Industry Report 2020: Industry Performance, COVID-19 Impact, Influencing Factors, Industry Associations. GlobeNewswire News Room. <https://www.globenewswire.com/fr/news-release/2021/03/24/2198258/28124/en/South-Africa-Construction-Industry-Report-2020-Industry-Performance-COVID-19-Impact-Influencing-Factors-Industry-Associations.html>

SA Commercial Prop News. (2016). The 2016 SA Women in Property Award winners announced. SA Commercial Prop News. <http://www.sacommercialpropnews.co.za/property-events/8421-2016-sa-women-in-property-award-winners-announced.html>

SA News : South African Government News Agency (2022) Government extends R350 COVID-19 grant by 12 months <https://www.sanews.gov.za/south-africa/government-extends-r350-covid-19-grant-12-months>

SACC. (n.d.). SACC004-A-SACC-THE-ECONOMIC-VALUE-OF-THE-DESIGNER-FASHION-SECTOR-RESEARCH-REPORT11.pdf. Retrieved 3 June 2022, from <https://twyg.co.za/wp-content/uploads/2020/08/SACC004-A-SACC-THE-ECONOMIC-VALUE-OF-THE-DESIGNER-FASHION-SECTOR-RESEARCH-REPORT11.pdf>

Southern African Customs Union SACU (2022). SACU Member States' Country Profiles - SACU Investment Roundtable. <https://www.sacu.int/docs/roundtable/Final-SACU-Member-States-Country-Profiles-e-booklet.pdf>

SAIIA. (n.d.). No woman left behind: The gender digital divide. SAIIA. Retrieved 3 June 2022, from <https://saiia.org.za/research/no-woman-left-behind-the-gender-digital-divide/>

Samman, E., Letouze, E., & Oliver, N. (14 September 2020). Women in the gig economy: Paid work, care and flexibility in Kenya and South Africa. Data-Pop Alliance. <https://datapopalliance.org/publications/women-in-the-gig-economy-paid-work-care-and-flexibility-in-kenya-and-south-africa/>

Scheba, A., & Turok, I. (2020). Informal rental housing in the South: Dynamic but neglected. *Environment and Urbanization*, 32(1), 109-132. <https://doi.org/10.1177/0956247819895958>

Schoeman, W. J. (2017). South African religious demography: The 2013 General Household Survey. *HTS Theologiese Studies / Theological Studies*, 73(2), 7. <https://doi.org/10.4102/hts.v73i2.3837>

SCI Foundation. (n.d.). Female Genital Schistosomiasis (FGS). SCI Foundation. Retrieved 3 June 2022, from <https://schistosomiasiscontrolinitiative.org/ntds-female-genital-schistosomiasis>

Sefolo, O. (23 November 2018). Addressing gender inequality in the SA construction sector. *Building & Decor*. <https://www.buildinganddecor.co.za/addressing-gender-inequality-in-the-sa-construction-sector/>

Sere, Y., Roman, N. V., & Ruiter, R. A. C. (2021). Coping With the Experiences of Intimate Partner Violence Among South African Women: Systematic Review and Meta-Synthesis. *Frontiers in Psychiatry*, 12. <https://www.frontiersin.org/article/10.3389/fpsy.2021.655130>

Services SETA. (n.d.): Services SETA Website: Retrieved 4 June 2022, from https://www.servicesseta.org.za/strategic_documents?&site=Strategic_Documents

- Services SETA. (2020). Services SETA Annual Report 2020 2021_9.pdf. https://www.servicesseta.org.za/public/uploads/document/Services%20SETA%20Annual%20Report%202020%202021_9.pdf
- Shall, S. (n.d.). South African Women in Construction. Women's Voice and Leadership SA. Retrieved 3 June 2022, from <http://www.wvlsa.org.za/grants/covid-19-grantees/south-african-women-in-construction/>
- Small Enterprise Development Agency. (n.d.). Women Enterprise Coaching Programme.pdf. Retrieved 3 June 2022, from <http://www.seda.org.za/Publications/Publications/Women%20Enterprise%20Coaching%20Programme.pdf>
- Smith, C. (2019). Counting women's work | Poverty and Inequality. <http://www.povertyandinequality.uct.ac.za/news/counting-women%E2%80%99s-work>
- Smith, C. (2021). SA's clothing industry trying to stitch itself together following worst decline to date. Fin24. <https://www.news24.com/fin24/companies/sas-clothing-industry-trying-to-stitch-itself-together-following-worst-decline-to-date-20210630>
- Solomons, N., & Gihwala, H. (2021). Ngo.ghjru.pdf. <https://www.ohchr.org/sites/default/files/Documents/Issues/Health/sexual-reproductive-health-covid/CSOs/ngo.ghjru.pdf>
- SOMO. (2006). Stitching-for-South-Africa.pdf. <https://www.somo.nl/wp-content/uploads/2006/01/Stitching-for-South-Africa.pdf>
- South Africa Gateway. (n.d.). Arts & Culture Archives. South Africa Gateway. Retrieved 1 June 2022, from <https://southafrica-info.com/category/arts-culture/>
- South Africa & National Planning Commission. (2012). Our future: Make it work: national development plan, 2030. National Planning Commission.
- South African Customs Union (SACU). (n.d.). Final-SACU-Member-States-Country-Profiles-e-booklet.pdf. Retrieved 3 June 2022, from <https://www.sacu.int/docs/roundtable/Final-SACU-Member-States-Country-Profiles-e-booklet.pdf>
- South Africa Gateway (2021). The 11 languages of South Africa. South Africa Gateway. <https://southafrica-info.com/arts-culture/11-languages-south-africa/>
- South African Geomatics Council. (n.d.). South African Geomatics Council SAGC Council for land surveyors, engineering surveyors, photogrammetric surveyors, mining surveyors, GIS practitioners, hydrographic surveyors. Retrieved 4 June 2022, from <https://www.sagc.org.za/>
- South African Government. (2020) Emergency Response Action Plan On Gender-Based Violence And Femicide. 30 April 2020 <https://www.thepresidency.gov.za/download/file/fid/1853>
- South African Government (2022). President Cyril Ramaphosa assents to laws that strengthen fight against gender-based violence. <https://www.gov.za/speeches/president-cyril-ramaphosa-assents-laws-strengthen-fight-against-gender-based-violence-28>

South African Government. (n.d.). Promotion of Equality and Prevention of Unfair Discrimination Act 4 of 2000 | South African Government. Retrieved 3 June 2022, from <https://www.gov.za/documents/promotion-equality-and-prevention-unfair-discrimination-act>

South African Government. (n.d.-a). Criminal Law (Sexual Offences and Related Matters) Amendment Act 32 of 2007 | South African Government. Retrieved 3 June 2022, from <https://www.gov.za/documents/criminal-law-sexual-offences-and-related-matters-amendment-act>

South African Government. (n.d.-b). Isivande Women's Fund | South African Government. Retrieved 3 June 2022, from <https://www.gov.za/services/business-incentives/isivande-womens-fund>

South African Government. (n.d.-c). SoNA-in-Numbers - 11 February 2021 | South African Government. Retrieved 3 June 2022, from <https://www.gov.za/speeches/sona-numbers-%E2%80%9311-february-2021-11-feb-2021-0000>

South African Government. (n.d.-d). South African Government | Let's grow South Africa together. Retrieved 3 June 2022, from <https://www.gov.za/>

South African Government. (n.d.-e). South Africa's provinces | South African Government. Retrieved 3 June 2022, from <https://www.gov.za/about-sa/south-africas-provinces>

South African Government. (n.d.-f). Structure and functions of the South African Government | South African Government. Retrieved 3 June 2022, from <https://www.gov.za/about-government/government-system/structure-and-functions-south-african-government>

South African Government, Traditional Courts Bill (2017) <https://www.parliament.gov.za/bill/2291643>

South African History Online (SAHO) (2016) Chieftaincy and Kingship in South Africa <https://www.sahistory.org.za/article/chieftaincy-and-kingship-south-africa>

Statistics South Africa (2014). General household survey 2013, StatsSA, Pretoria.
Statistics South Africa (2014) Manufacturing Industry, 2014
<http://www.statssa.gov.za/publications/P3002/P30022014.pdf>

Statistics South Africa (2019) in Department of Trade, Industry and Competition (DTIC) (2020) South African R-CTFL Value Chain Master Plan to 2030 http://www.thedtic.gov.za/wp-content/uploads/Masterplan-CTFL_Value_Chain.pdf

Statistics South Africa (2020). Migration Dynamics of women, children and the elderly in South Africa / StatsSA, Pretoria. <http://www.statssa.gov.za/publications/Report-03-51-04/Report-03-51-042020.pdf>
Statistics South Africa (2020, October 15) SA loses more than 600K formal sector jobs during COVID-19 lockdown <https://www.statssa.gov.za/?p=13690>
Statistics South Africa (2021a). Mid-year population estimates 2021. Pretoria, South Africa

Statistics South Africa (2021b). A breakdown of national government spending in 2019/20. [accessed 7 June 2022] Available at: <https://www.statssa.gov.za/?p=14484>

- Statistics South Africa (2021c). Inflation for 2020 was the lowest in 16 years and the second lowest in 51 years. <https://www.statssa.gov.za/?p=13930>
- Steyn, J. N., & Sewell, W. (n.d.). Priority Research Needs of the South African Wholesale and Retail Sector. 27. <http://wrlc.org.za/wp-content/uploads/2013/09/SA-Business-Review-Journal-Paper-July-2013-1.pdf>
- Teagle, A. (2021). HSRC. <http://www.hsrc.ac.za/en/news/dces/women-land>
- The Borgen Project. (12 July 2018). 10 Facts About Girls' Education in South Africa. The Borgen Project. <https://borgenproject.org/facts-about-girls-education-in-south-africa/>
- The Commonwealth. (2022). South Africa. Commonwealth. Retrieved 1 June 2022, from <https://thecommonwealth.org/our-member-countries/south-africa>
- World Factbook. (2022). South Africa. In The World Factbook. Central Intelligence Agency. <https://www.cia.gov/the-world-factbook/countries/south-africa/>
- TIPS. (2017). Manufacturing_subsectors_-_Clothing_footwear_and_textiles_2017.pdf. https://www.tips.org.za/images/Manufacturing_subsectors_-_Clothing_footwear_and_textiles_2017.pdf
- Ubink, J., & Duda, T. (2021). Traditional Authority in South Africa: Reconstruction and Resistance in the Eastern Cape. *Journal of Southern African Studies*, 47(2), 191-208. <https://doi.org/10.1080/03057070.2021.1893573>
- United Nations Development Programme UNDP. (n.d.-a). Gender Inequality Index (GII) | Human Development Reports. Retrieved 2 June 2022, from <https://hdr.undp.org/en/content/gender-inequality-index-gii>
- United Nations Development Programme UNDP. (n.d.-b). South Africa | UNDP Climate Change Adaptation. Retrieved 2 June 2022, from <https://www.adaptation-undp.org/explore/africa/south-africa>
- UNICEF South Africa. (2022). STEM unlocking the potential of rural South African girls in aviation and space technology. <https://www.generationunlimited.org/stories/stem-unlocking-potential-rural-south-african-girls-aviation-and-space-technology>
- University of Cape Town. (2013). Employment outcomes and returns to earnings in post-apartheid South Africa. University of Cape Town.
- UN Women. (n.d.). South Africa. Retrieved 3 June 2022, from <https://evaw-global-database.unwomen.org/en/countries/africa/south-africa?formofviolence=33551dco667d4610b557c142b729c2a5#1>
- USB. (n.d.). Equal pay for equal work: How does South Africa measure up? USB. Retrieved 3 June 2022, from https://www.usb.ac.za/usb_insights/equal-pay-for-equal-work-how-does-south-africa-measure-up/
- Veitch, C. (2019). The South African Construction Industry - 2019 | Who Owns Whom. <https://www.whoownswhom.co.za/report-store/south-african-construction-industry-south-africa-2019/>
- Vlok, E. (n.d.). Constraints and Opportunities in the Clothing and Textile Sectors. 2. https://assets.website-files.com/5f164f589a54e1132e7de843/5f5084ae554a5144e66720e1_Etienne%20Vlok%20-%20Constraints%20and%20opportunities%20in%20the%20clothing%20and%20textile%20sectors.pdf

Washington Post. (2020). Analysis | African women have less access to the Internet than African men do. That's a problem. Washington Post. <https://www.washingtonpost.com/politics/2020/03/06/african-women-have-less-access-internet-than-men-do-thats-problem/>

Western Cape Department of Human Settlements. (n.d.). Human-settlements-five-year-strategic-plan-2020-2025.pdf. Retrieved 4 June 2022, from <https://www.westerncape.gov.za/assets/departments/human-settlements/docs/human-settlements-five-year-strategic-plan-2020-2025.pdf>

Western Cape Government. (n.d.). Technology for Women in Business. Western Cape Government. Retrieved 3 June 2022, from <https://www.westerncape.gov.za/service/technology-women-business>

Williams- Elegbe (2021) Equity and Inclusion of Women-Owned Business (WOBs) in Public Procurement in South Africa. 41. <https://www.open-contracting.org/wp-content/uploads/2021/12/OCP2021-WOB-South-Africa-.pdf>

Winning, A., & Kumwenda-Mtambo, O. (2022) South Africa hikes rates as it steps up inflation fight. Reuters. <https://www.reuters.com/world/africa/south-africa-hikes-rates-it-steps-up-inflation-fight-2022-05-20/>

Women's Property Network. (n.d.). Educational Trust. Women's Property Network. Retrieved 4 June 2022, from <https://www.wpn.co.za/educational-trust>

Women's Voice & Leadership South Africa (2019). Mapping Of Women's Rights Organisations in South Africa http://www.wvlsa.org.za/wp-content/uploads/2019/11/WVL-SA_MappingResearchFindings-revised_nmmkr_-19112019.pdf

World Bank (2020). Handbook for Gender-Inclusive Urban Planning Design <https://www.worldbank.org/en/topic/urbandevelopment/publication/handbook-for-gender-inclusive-urban-planning-and-design>

World Bank. (2021). Women, Business and the Law 2021. The World Bank. <https://doi.org/10.1596/978-1-4648-1652-9>

World Bank (2022). South Africa Gender Assessment. Washington, D.C.: World Bank https://cmsignition.co.za/download/files_8/South-Africa-Gender-Assessment-April-2022-FINAL.pdf

World Bank Group. (n.d.). 102850-WP-P149486-Box394847B-PUBLIC-Factory-Southern-Africa-FINAL-PUBLISH-002.pdf. Retrieved 3 June 2022, from <https://documents1.worldbank.org/curated/en/973351468195001238/pdf/102850-WP-P149486-Box394847B-PUBLIC-Factory-Southern-Africa-FINAL-PUBLISH-002.pdf>

World Bank. (n.d.). South Africa - Quarterly Labour Force Survey 2021, Quarter 1. Retrieved 2 June 2022, from <https://microdata.worldbank.org/index.php/catalog/4074>

World Bank. (n.d.-a). Rural population (% of total population) - South Africa | Data. Retrieved 1 June 2022, from <https://data.worldbank.org/indicator/SP.RUR.TOTL.ZS?locations=ZA>

World Bank. (n.d.-b). Urban population - South Africa | Data. Retrieved 1 June 2022, from <https://data.worldbank.org/indicator/SP.URB.TOTL?locations=ZA>

World Benchmark Alliance. (n.d.). The-Foschini-Group-GB-2021-Detailed-Assessment.pdf. Retrieved 3 June 2022, from <https://assets.worldbenchmarkingalliance.org/app/uploads/2021/06/The-Foschini-Group-GB-2021-Detailed-Assessment.pdf>

World Economic Forum. (2021). WEF_GGGR_2021.pdf. https://www3.weforum.org/docs/WEF_GGGR_2021.pdf

W&R SETA (2017). Sector Skills Plan 2017-2018
<https://www.wrseta.org.za/sites/default/files/2020-01/2017-18%20SSP.pdf>

W&R SETA. (2020). WRSETA_SP_and_APP_Including_Annexures_FY2021-2022_12_March_2021.pdf. Retrieved 4 June 2022, from https://static.pmg.org.za/WRSETA_SP_and_APP_Including_Annexures_FY2021-2022_12_March_2021.pdf

Limitations of Research

The Pathways Study is subject to the following research limitations, related to both the scope and timing of the study. The most important of these are captured below, but this list may not be exhaustive.

NOTE: Research design for the Pathways Study was completed in mid-2020, ground-level econometric data forecasting was completed in late 2020, fieldwork was carried out over January to June 2021 and the reports were prepared from then into 2022.

Evolving Topics/Input – General Factors and External Events

- Country policies are live guidelines which are periodically updated. The Pathways Study focuses on policy provisions and/or omissions for women's economic empowerment (WEE); its core focus has not been on analysing policies (e.g., the learnings, adjustments, and impact over time). Rather, the gendered linkages are the key focus of the Pathways Study.
- A qualitative inquiry about the impact of the COVID-19 pandemic on women's economic empowerment across sectors was incorporated into fieldwork and reports. However, given the research timing, at the beginning of and during the pandemic, new insights on its impact continue to emerge and could not be fully captured.
- The Pathways study recognises the importance of climate change, with broad impact that varies by sector, commodity, and gender, amongst other factors. While this did not form the focus of this study, the research explores its broad effects on the economy and (women in) agriculture and proposes relevant recommendations (e.g., climate-smart interventions) while also recognising recent country measures to integrate gender into the climate change agenda.
- Similarly, the ongoing conflict between Russia and Ukraine has impacted various sectors globally including in Sub-Saharan Africa. There is no doubt that the geopolitical challenges and supply chain disruptions have an impact on women's economic opportunities. However, this is not captured in the report as the Russia-Ukraine war started after data collection was completed.
- Gender-based violence (GBV) harms many women and girls across Sub-Saharan Africa and beyond. The Pathways Study reports cover GBV under Normative barriers (sub-section 4.2.3) and highlight its different forms. Beyond analytical findings, some specific recommendations (across policy/advocacy, programming and research) are made to tackle GBV on a sectoral basis, which was the research focus. However, tackling GBV in girls and students requires specific inquiry and responses which go beyond the scope of this study.

Other Topics

Most recommendations are made without reference to specific stakeholders (e.g., faith-based groups, interest-based groups). The operations and belief systems of this rich variety of potential stakeholders also varies across the 13 countries covered. The Pathways Study sought to make recommendations relevant to all stakeholders involved in policy development and programming, regardless of their specific areas of application.

⁸ Footnote

