THE MANDELA INITIATIVE
Dialogue and action to overcome poverty and inequality

HSRC Human Sciences Research Council

Theme: Social Cohesion

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Multidimensional Wellbeing: What it is, and how it relates to reducing poverty and inequality – a conceptual, historical, methodological and practical approach[2]

Evidential base of the contributions: *Review of existing literature on wellbeing conceptualisation, measurement, policies and effects of racism on wellbeing*

Stakeholders who have been/will be involved in generating recommendations: A *multidisciplinary team[3] of senior researchers, postdoctoral fellows and research trainees at the HSRC (masters and PhD interns); with public engagement through three public seminars and three conferences (HDCA, HSRC conference and Department of Science and Technology Science Forum).*

1. **What are the major issues you have identified about the manifestations of structural poverty and persistent, deep inequalities [in your focus area(s)]?**

Poverty and inequality have long been recognised as comprising *multiple dimensions*. With regards to poverty, a multidimensional approach recognises the importance of education, health, living environment and economic opportunities (Alkire and Santos, 2014) amongst other aspects. Likewise, the *2016 World Social*

About this brief

This brief was commissioned by the Mandela Initiative to help inform a synthesis report on its work since the 2012 national conference, Strategies to Overcome Poverty and Inequality, organised by the University of Cape Town. The MI provides a multi-sectoral platform to investigate and develop strategies to overcome poverty and reduce inequality in South Africa. While the Nelson Mandela Foundation is a key partner, the Initiative has relied on collaborations between academics and researchers, government, business leaders, civil society, the church and unions.

The synthesis report serves as a framework for reporting on the work of the MI at a national gathering on 12 – 14 February 2018 at the University of Cape Town. The MI Think Tank has identified the objectives for the gathering as:
- to anchor the contributions of the MI within an analysis of the current South African political and economic context;
- to share the recommendations emanating from the MI-related work streams at a policy/strategic level to advance the goal of eliminating poverty and reducing inequality;
- to critically engage with the potential impact of the recommendations on eliminating structural poverty and inequality; and
- to discuss ways of promoting popular conversations and debate about what needs to be done to eliminate poverty and reduce inequality, beyond the MI.

The synthesis report aims to assist participants to prepare for the national gathering. The report drew on findings from the sectoral research projects of Think Tank members; the MI's Action Dialogues; a report on an MI Community of Practice workshop with research chairs from different universities to identify cross-cutting themes emerging from the MI's research programme; and the work programmes of others who have expressed an interest in contributing to the goals of the MI.

Science Report offers an analysis of seven dimensions of inequality that expand these dimensions of poverty and include social, cultural, political and knowledge-based dimensions of inequality alongside those shared with poverty (economic, spatial and environmental). These multiple dimensions of poverty and equality have far-reaching consequences for the notion of *wellbeing* for South Africa's peoples. However, it is widely known that material and economic approaches ("what resources people have") have long dominated the ways in which we have conceptualised and measured both poverty and inequality, as well as wellbeing. In the past decades, the notion of subjective wellbeing ("how people feel about what they have?") has received much attention. These studies have included life satisfaction, capabilities, happiness, and quality of life surveys amongst others. What seems to be missing is the notion of collective, relational or social wellbeing – how people engage with each other, and the structures in which they find themselves in order to enhance their wellbeing.

2. **What do you think are the main reasons for the persistence of the deep inequalities and poverty [in your focus area(s)]? These can include policy, capacity or implementation constraints/problems.**

What this study (begun in May 2017), currently being undertaken by a multidisciplinary team of researchers from the HSRC is seeking to achieve, is to ensure that the space between the objective/material and subjective/psychological is deeply interrogated. We are calling this space the social/collective/relational realm and have produced four outputs to date:

- *A critical review that asks how wellbeing has been conceptualised in general and whether these conceptualisations are adequate and appropriate for global South contexts given its particular circumstances.*

Our key findings include that conventional frameworks for understanding development infers that poor people are defined solely by their poverty. What a multidimensional wellbeing (Sumner & Mallett, 2012) approach to development allows for is an interdisciplinary focus: one that considers human functioning, capabilities and needs, livelihoods and resources, in a holistic manner. Such an approach places the person, in their relationships and surroundings, at the centre, and presents opportunities for investigating the prevalence of racialised and gendered distribution of resources and opportunities; understandings of wellness that are different to those from people in the global North; and how these impact an individual's and community's ability to be well. We are convinced that a new Southern understanding of wellness is necessary; one that describes the social nature of human beings (Keyes 1998) and that explores experiences of connectedness between the individual and their social environment. In the words of White (2010, p. 15): "Wellbeing happens in relationships: between the collective and the individual; the local and the global; the people and the state. Relationship is thus at the centre of wellbeing analysis and politics." Reorienting our focus from the material and subjective to the social helps answer questions such as: (1) How are prevailing structures of social relations in unequal societies maintained/challenged? and (2) What is the impact of oppressive contexts on networks of relations in communities?

- *An analytical review of how wellbeing has being addressed through ideology and policy with a focus on African contexts.*

This comparative analysis shows that social policies – their form, content and ultimately their impact – cannot be separated from the economic and political circumstances that accompany their genesis and with which they evolve. It also suggests that there are specific ideologies attached to using social policy as a retroactive step to solve economic shortcomings, without offering visions of social arrangements or ideals worth striving for on their own terms, or imagining how social policies may be used for redistribution, social cohesion and nation building. This review includes an analysis of social policy 'safety nets' produced through industrialisation, and following various Liberal, Corporatist and Socially Democratic approaches, showing how these were taken up in some Asian and African contexts in the twentieth century. These productivist capitalist approaches are contrasted to African socialist experiments. This review includes various South African policy case studies (including the outcome of the high-level panel on policy) and the impact of the family policy, the Expanded Public Works programme, the youth policy and potentially a basic income grant on social/collective/relational wellbeing.

- *A systematic review of the quantitative and qualitative measures of wellbeing in South Africa as it relates to poverty and inequality (to be followed with a critical synthesis of the findings of the papers that describe these measures).*

This systematic literature review, the first of its kind according to our knowledge, considered over 10,000 articles and analysed 180 articles through a series of sort criteria (11 wellbeing terms). It answered the question: How has wellbeing has been measured in South Africa in the period 1994 – 2016. Although South Africa has a long history of wellbeing research (for example see Clarke 2003 and Møller 2013), this is the first systematic review that focuses on questions of methodology. Findings include that by far the majority of methods used to measure wellbeing are quantitative (only five studies were qualitative or employed mixed methods included a qualitative component); there were 91 different quantitative scales used; wellbeing is variously defined and thus variously measured; most frequently wellbeing is considered as a subjective evaluation via life satisfaction or individual personal functioning; the leading conceptions of 'wellbeing' used in the studies under review tend to treat 'wellness' as a private phenomenon; studies mainly ignored social contexts in their interrogations; and relational, social and collective wellbeing are under-researched (and under-measured) areas in South Africa.

- *A contextual, postcolonial focus on individual and collective agency to influence systems and change situations in oppressive contexts, that includes the role that racism plays on people's wellbeing, and ability to act to change their circumstances.*

This component of the study took the form of a conjectural paper focused on people's sense of agency to make a difference to their perceived situations, employing the capabilities approach. In oppressive

environments, the centrality accorded to freedom highlights the limits placed on people's ability to be and do. Structural violence limits the availability of options, acting as an external constraint to capabilities and achieved functionings. It should, we argue, also draw attention to the ability of individuals to take up options which are apparently available to them. Internal capabilities are shaped by the environment, and continued oppression often shapes or hinders their development such that they act as a constraint on people's ability to live the life they have reason to value. Adapted preferences have received attention, especially in relation to woman's self-assessed well-being. Although critically important, individuals adapting to their oppressive environments and as a result not viewing their circumstances as egregious infringements on their freedom is only part of the story. The foundational work of Frantz Fanon, Paulo Freire and Steve Biko, followed by a host of other global South academics, outlines how oppressive environments take their toll on people, in ways other than adapted preferences. Dehumanising treatment, over time, dehumanises. In contrast to adaptive preferences, they argue that many people living in oppressive environments are angry at the treatment they receive, but that they feel powerless (at least as individuals) to fight back against such treatment. This anger and sense of powerlessness can lead to apathy and, for some, self-destructive or anti-social behaviour. Our measurements of wellbeing have not adequately captured the myriad internalised effects of living in oppressive environments, and how these limit freedom. We do not know who is most effected and how these affects are limiting their ability to live the life they have reason to value. Without this knowledge, it is unsurprising that we do not have interventions, which we argue are warranted, to support people to overcome the consequences of prolonged exposure to dehumanising treatment.

3. **What is being recommended at a macro policy/strategic level to deal with the major issues you have identified?**

Unpacking these multiple dimensions of wellbeing may help us move towards deeper understandings of how wellbeing changes over time, generation, geography and when people compare themselves to others. Such knowledge may provide pointers to future comprehensive multi-faceted policies and interventions for improving wellbeing. The aim is to turn the lens from what debilitates (an absence of resources) and how it is evaluated, to what capacitates – especially in collective, relational and social networks of wellbeing. Our strategic recommendation is that the multidimensional understanding of wellbeing becoming a core concern for initiatives on poverty and inequality; and that it include all three dimensions rather than only focusing on aspects of wellbeing.

4. **What do you think the potential impact of the recommendations will be on eliminating structural poverty and reducing inequality?**

- We have inserted an experimental module into the South African Social Attitudes Survey 2017 to understand how people believe they are treated in general, in public spaces, while accessing services and at home; to what they attribute this treatment; and the extent to which they believe they can change this treatment. This speaks to our focus on collective agency and wellbeing in

oppressive environments.

- We are also considering convening a learning initiative to discuss and document evidence for the effects of racism on human functioning in South Africa. We are currently debating its usefulness.

- We are beginning a pilot qualitative study that asks households in two economic brackets (highly impoverished and those in a working-class suburb) to describe the collective strategies and networks they employ to improve the wellbeing of their households. This is a direct outcome of the dearth of both qualitative studies found in our systematic review and also because of the focus on subjective wellbeing to the exclusion of the social/collective/relational.

- We are asking ourselves the question whether a new Multi-Dimensional Index of Wellbeing is a useful tool for South Africa that would include all three aspects of wellbeing – objective/material; social/collective/relational; and subjective/psychological.

- Ultimately, we believe that policies focused on the social/collective/relational aspects of human wellbeing has a role to play in alleviating poverty and inequality.

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