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Southern African Social Policy Research Insights

Results from a pilot of the MIS approach in South Africa

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Outline

- Background – what is the MIS approach?
- How does this pilot study relate to MIS?
- How does this pilot build on work that has already been done in South Africa?
- Challenges for the MIS methodology in the South African context
- Design of the pilot
- Findings
- Next steps

Background: MIS (1)

- A Minimum Income Standard for the United Kingdom is a major programme of work which regularly reports on how much income households need in order to afford an acceptable standard of living.
- Developed over the past decade and carried out by CRSP at Loughborough University, with on-going funding from the Joseph Rowntree Foundation.
- The results are used to inform debates and practice in relation to the living wage.
- The methodology is increasingly applied around the world.
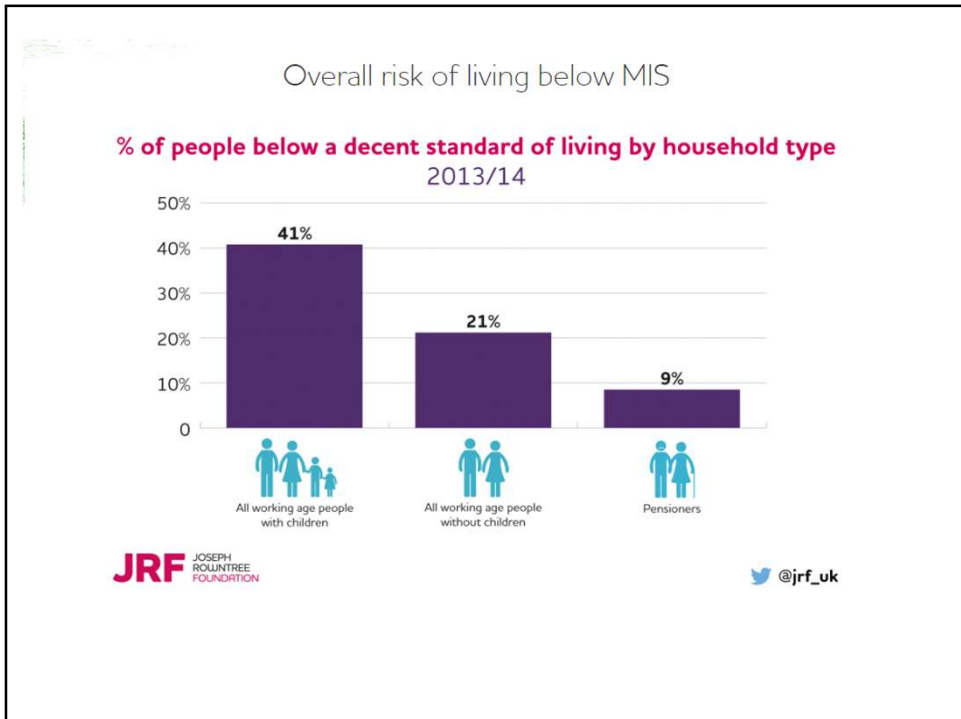
Background: MIS (2)

- Focus groups are undertaken with people to identify:
  - A definition of a decent standard of living, for later focus groups to refer to
  - A case study of example households, for later focus groups to refer to
  - A detailed list of items and activities that are necessary for a decent standard of living (for different household structures and people of different ages)
- The lists are then costed out to obtain an estimate of the income required to have a decent standard of living.

A Minimum Income Standard for the UK in 2016

by Abigail Davis, Katherine Hill, Donald Hirsch and Matt Padley

This report is the 2016 update of the Minimum Income Standard for the United Kingdom, based on what members of the public think people need for an acceptable minimum

Overall risk of living below MIS

% of people below a decent standard of living by household type
2013/14

- All working age people with children: 41%
- All working age people without children: 21%
- Pensioners: 9%

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How this pilot relates to MIS

- Definition of a decent standard of living *(yes but very briefly!)*
- **Definition of the 'case study' person** *(yes but just one case study)**
- **Obtain a list of items** *(yes but just for three aspects: living area, sleeping area, communication)**
- Repeat the list for different age groups *(no- the pilot just considered people of working age)*
- Repeat the list for different household types *(no- the pilot just considered a single person, though s/he can live in any household type)*
- Cost out the lists *(no)*
- Obtain an income threshold *(no)*

* The most pivotal questions for pilot phase: achievable in South Africa?

How the pilot builds on previous work in SA

- Survival is important but does not on its own achieve a decent standard of living: poverty research needs to aim higher and anyway people's sights are higher. The pilot moves away from minimalist income/consumption-based poverty lines that focus only on survival.
- The socially perceived necessities study for DSD demonstrated a high level agreement about a set of necessities across different groups in society. SPII, LRS and SASPRI have been working to take this finding forwards.
- This pilot enables us to explore whether agreement can still be achieved at a 'drilled down' level: moving beyond indicators to comprehensive lists using the MIS approach.

A collaborative endeavour

Funded by Loughborough University

Pilot implementation by:

- SASPRI – Michell Mpike, Wanga Zembe-Mkabile, Gemma Wright, Michael Noble, Christine Byaruhanga, with support from Amandla Ngwendu
- NMMU – Phakama Ntshongwana, Siyabulela Mandela, Pedro Mihlali Mzileni
- Loughborough University – Matt Padley, Abigail Davis

Pilot design additionally involved:

- SPII – Isobel Frye and Angelo Louw
- LRS – Trenton Elsley
- Loughborough University - Donald Hirsch

Challenges of MIS in SA

- MIS in the UK brings together people of all income levels to take part in each focus group.
- MIS in the UK is undertaken exclusively in English.
- MIS uses a case studies that comprises a named person/people and the name of the place where they live.
- MIS in the UK assumes that people have access to basic services such as electricity, water and sanitation, and that people live in Western-style housing.
- MIS in the UK is undertaken at the level of the needs of *individuals* which are then brought together into households.
- MIS focus groups take a long time!

All of these issues were challenges…

Design of the pilot (1)

- 2 orientation focus groups - aim to build on what is already known in terms of a definition of a decent standard of living, and 'reality check' and develop the case study of Mr B/ Ms B.
- 2 task groups – aim to draw up a list of items that are essential for Mr B/Ms B, for three themes
- 2 check back groups – aim to reality check the lists obtained in the task groups
- 1 final negotiation group – aim to resolve any outstanding issues.

Design of the pilot (2)

Focus Group & location	Type of Focus Group	Purpose of Focus Group
1-Gugulethu 2-Claremont	Orientation Groups	To get participants to construct a definition of a decent living level and to construct the case study for the hypothetical Ms B/Mr B
3- Gugulethu 4-Peddie	Task Groups	To get participants to compile a list of items needed for Ms B/Mr B to have a decent standard of living in relation to the three areas: living area, communication & sleeping area
5-Peddie 6-Observatory	Check Back Group	To review the list of items compiled by the Task Groups and to see whether participants could come to agreement that these items were necessary for a decent standard of living
7 -Gugulethu	Final Negotiation Group	To resolve any outstanding items that were brought forward by the previous groups.

Design of the pilot (3)

Focus Group	Location of focus group & province	Type of area	Type of focus group	Language(s) used in group
1	Gugulethu- Western Cape	Township	Orientation Group	isiXhosa
2	Claremont- Western Cape	Urban formal suburb	Orientation Group	isiXhosa & English
3	Gugulethu- Western Cape	Township	Task Group	isiXhosa
4	Peddie- Eastern Cape	Former Homeland	Task Group	isiXhosa
5	Peddie- Eastern Cape	Former Homeland	Check back Group	isiXhosa
6	Observatory- Western Cape	Urban formal suburb	Check back Group	English
7	Gugulethu- Western Cape	Township	Final Negotiation Group	isiXhosa

Design of the pilot (4)

- 7 focus groups took place between July and August 2016
- 67 people aged 18-59 took part in the focus groups
- Languages: isiXhosa and English
- Gender: 61% female and 39% male
- Highest education level attained: 25% primary/pre-primary, 42% secondary, 25% tertiary, 3% other, 4% unreported.
- Employment status: 39% employed, 27% unemployed, 12% home-maker, 10% retired, 7% self-employed, 4% unreported.

Emerging findings

- Despite the diversity of the groups and the high levels of inequality in South Africa, the MIS methodology (duly amended) did seem to work!

- The groups were able to reach a broad level of agreement about the necessities for Ms B/Mr B, in relation to the three aspects of communication, a living area and the sleeping area.

Communication: the necessities for Ms B / Mr B

- Entry level smart phone (1 year)
- Stamps (R150 per year)
- Envelopes (R150 per year)
- WiFi (5GB per month)
- Laptop (may last for 5 years?)
- Radio (accessed via music system)
- Newspaper (access – but not necessarily purchase - it every day and R15 per week for the weekly paper)

The living area: the necessities for Ms B / Mr B

- TV (should last for 10 years)
- TV stand
- HiFi system with radio, CD and DVD players (10 years)
- 6 seater lounge suite (15 years)
- Bookshelf (does not need to be replaced)
- Dining table and chairs (10 years)
- DVDs (R2000 per year)
- Burglar bars
- CDs (R250 per month)
- Heater

The sleeping area: the necessities for Ms B / Mr B

- Bed base (15 years)
- Mattress (7 years)
- Headboard (15 years)
- Dressing table with mirror and chair (15 years)
- Bedside pedestals (15 years)
- Wardrobe (15 years)
- Blankets x 2 (2 years)
- Heater (different one to the one in the Living area) (5 years)

- Bedside lamp (2) (10 years, 5 years bulbs)
- Pillows (2 or 4) (3 years)
- Pillow cases (4 or 8) (3 years)
- Comforters (2 or 3 sets) (3 years)
- Sheets (3 sets) (fitted and top sheet) ((1.5 years)
- TV and TV Stand -unresolved
- Carpet

Next steps

- Compare the findings with the parallel pilot in Mexico
- Undertake a full MIS in South Africa to obtain income levels for different household types and compositions

Thank you

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