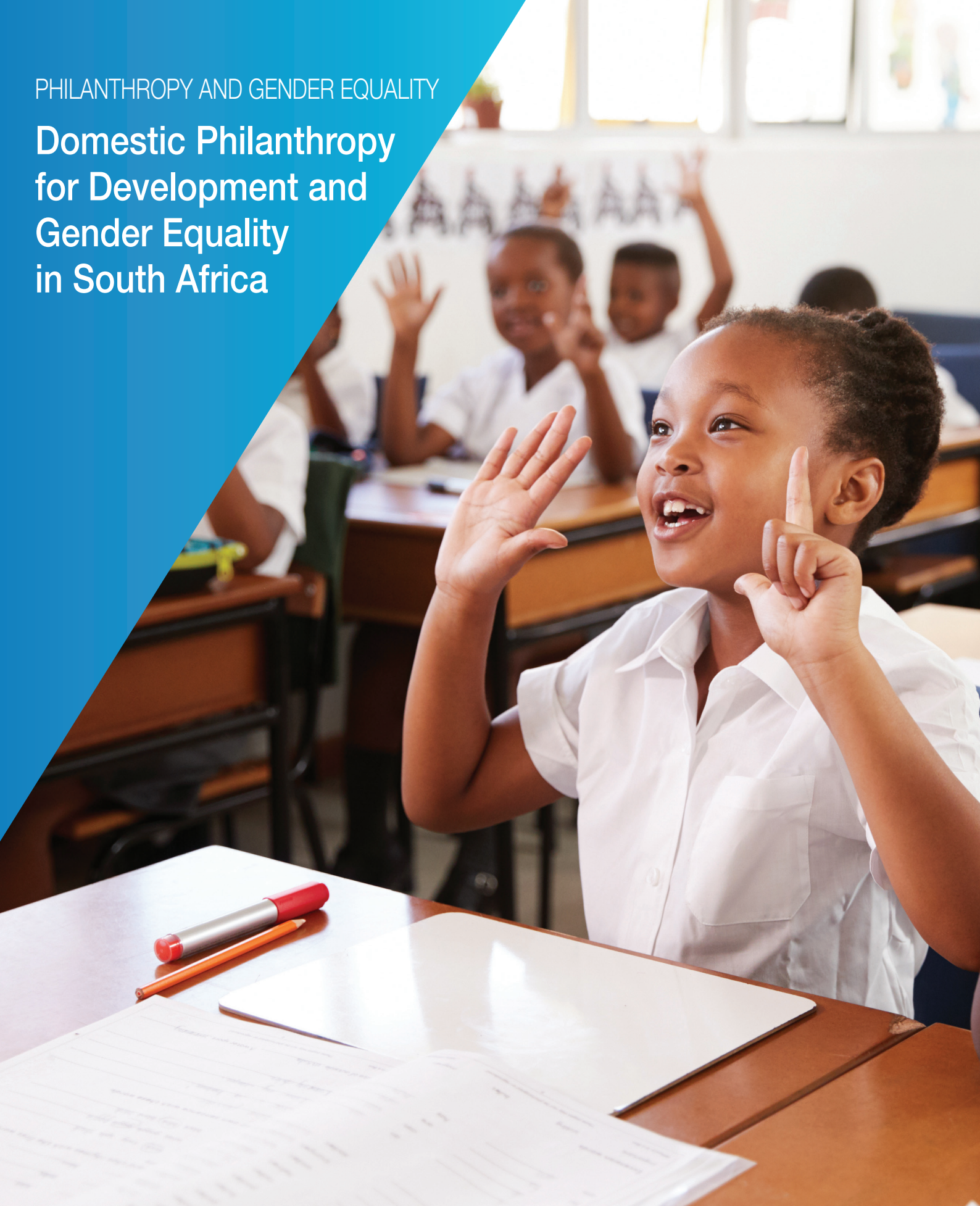


PHILANTHROPY AND GENDER EQUALITY

# Domestic Philanthropy for Development and Gender Equality in South Africa



**OECD CENTRE ON PHILANTHROPY**  
Data and analysis for development

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PHILANTHROPY AND GENDER EQUALITY

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Private philanthropy is a growing source of funding for middle- and low-income countries – supporting global public health, education, agriculture, gender equality or clean energy. However, reliable, comparable and publicly available information on philanthropic funding, priorities and behaviours is surprisingly scarce. This lack of data and evidence has limited philanthropy's potential to engage, collaborate or co-fund key issues outlined in Agenda 2030, together with other actors working in developing countries and emerging economies.

The OECD Centre on Philanthropy contributes to the global demand for more and better data and analysis on global philanthropy for development. It seeks to bring together relevant efforts from existing research centres and projects, expand the OECD database, and provide research and analysis on global trends and impact of philanthropy for development in the context of the Agenda 2030.

To learn more, please see [www.oecd.org/development/philanthropy-centre](http://www.oecd.org/development/philanthropy-centre).

## Foreword

This report analyses domestic philanthropic giving for development and gender equality in South Africa. It builds on grant-level data and insights collected through an OECD survey deployed among 31 large philanthropic organisations in South Africa. The report does not examine the effects of the COVID-19 pandemic on domestic philanthropy in South Africa given that the survey covered the period 2013-18. Instead it provides solid baseline information against which to monitor the evolution of the domestic philanthropic flows in the aftermath of the pandemic.

The OECD Centre on Philanthropy carried out the study in collaboration with the Independent Philanthropy Association of South Africa (IPASA). It is part of the Centre's research in five emerging economies (Colombia, India, Nigeria, The People's Republic of China and South Africa). These studies aim to help shed light on domestic philanthropy's contribution to development and to suggest recommendations to address critical issues outlined in Agenda 2030.

The report was written under the guidance of and with inputs from Bathylle Missika, Head of the Networks, Partnerships and Gender Division at the OECD Development Centre. It was prepared by Nelson Amaya, Policy Analyst for the Centre, and benefited from inputs and comments from colleagues in the Networks, Partnerships and Gender Division (Hyeshin Park, Pierre de Boissésou, Alejandra Maria Meneses, Ewelina Oblacewicz, Laura Abadia, Sarah Stummbillig, Raymond Shama, Noemi Milo, Franziska Fischer and Zélie Marçais) and Development Co-operation Directorate (Olivier Bouret and Tomáš Hos). We would also like to thank Henri-Bernard Solignac-Lecomte, Aida Buendia and Delphine Grandrieux from the Development Communications team for design and editorial contributions. The report was edited by Mark Foss, to whom we would also like to express our gratitude.

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## Abbreviations and acronyms

<b>B-BBEE</b>	Broad-Based Black Economic Empowerment
<b>CRS</b>	Creditor Reporting System (OECD)
<b>CSI</b>	Corporate social investment
<b>DAC</b>	Development Assistance Committee (OECD)
<b>DEV</b>	Development Centre (OECD)
<b>GDP</b>	Gross domestic product
<b>GNI</b>	Gross national income
<b>HNWI</b>	High net worth individuals
<b>IPASA</b>	Independent Philanthropy Association of South Africa
<b>NGO</b>	Non-governmental organisation
<b>NPC</b>	Non-profit company
<b>NPO</b>	Non-profit organisation
<b>ODA</b>	Official development assistance
<b>OECD</b>	Organisation for Economic Co-operation and Development
<b>PBO</b>	Public Benefit Organisation
<b>PPP</b>	Purchasing power parity
<b>REIPPPP</b>	Renewable Energy Independent Power Producer Procurement Programme
<b>SIGI</b>	Social Institutions and Gender Index (OECD)

## Exchange rates and deflators

Throughout this report, unless otherwise stated, nominal end-of-year exchange rates are used to convert South Africa Rands (RND) to United States dollars (USD) (OECD, 2020<sup>[1]</sup>), Consumer Price Index annual change in South Africa and the deflator for constant 2018 USD:

Year	RND - USD Nominal end-of-period exchange rate	Consumer Price Index in South Africa (annual percentage change)	USD CPI deflator (2018=100)
2013	10.49	5.8	0.77
2014	11.58	6.1	0.82
2015	15.54	4.5	0.85
2016	13.68	6.6	0.91
2017	12.32	5.2	0.96
2018	14.38	4.5	100

## Executive summary

**The first objective of this study is to provide open, reliable and comparable data and analysis on the scope, scale and diversity of domestic philanthropic flows in South Africa.** South Africa is estimated to receive close to USD 138 million annually from international foundations. This makes the country the sixth largest recipient in developing countries for which data are available. However, current estimates do not consider funding from domestic foundations because information on domestic philanthropic giving is scarce (OECD, 2018<sup>[2]</sup>).

**The second objective is to provide an in-depth focus on domestic philanthropy's support to gender equality.** South Africa has made important advances towards gender equality in recent years, including a solid legal framework to work against structural obstacles to gender equality. However, persistent challenges remain in the unpaid care burden women face, gender-based violence and access to justice.

**Recent legal reforms have expanded the scope of activities and the diversity of entities within the non-profit sector.** Financing towards small businesses, labour market skills for youth and other initiatives related to the business sector indicate that the non-profit sector is expanding through commercial activities. These reforms include the Broad-Based Black Economic Empowerment policy (B-BBEE) in 2003 and renewable energy investment through the 2011 Renewable Energy Independent Power Producer Procurement Programme (REIPPPP). New entities such as BEE trusts, non-profit companies and REIPPPP trusts do not strictly represent traditional philanthropists. However, they effectively represent private organisations that carry out investments in areas that support South Africa's socio-economic development.

**The study shows that domestic philanthropy is significantly higher than previously estimated but remains relatively small when compared to official development assistance (ODA) and still lower than international philanthropy in South Africa.** Domestic giving by 31 large individual, family and corporate foundations who agreed to share their data amounted to approximately USD 445 million between 2013 and 2018, averaging USD 74 million per year. This represents around half of the funding from international foundations to South Africa, which as of 2015 stood at an average USD 138 million per year. Domestic funding stands at close to 8% of average yearly net ODA in the country, which has been decreasing as a percentage of gross national income (GNI). Domestic philanthropy in South Africa is predominantly corporate and highly concentrated, with only five foundations representing over half of total funding.

**Education funding represents over half of domestic philanthropy, while support to human rights, democratic participation and civil society is also prominent in donors' portfolios.** Most foundations are heavily involved in education, with 28 of 31 surveyed foundations providing funding in this area. This makes education the largest sector with 55% of total funding (USD 200 million) allocated to projects related to higher education, education facilities and training, and basic skills for youth. In addition, a distinctive feature of financing provided in South Africa is the significant financial resources directed towards human rights' organisations, including women's rights organisations, as well as research on judicial development and racial inequalities.

**Geographically, funding from domestic philanthropic organisations is concentrated in a few provinces.** Northern Cape received the most funding (17%), with close to USD 74 million from SIOC Community Development Trust, followed by Western Cape with USD 70 million (16%) and Eastern Cape with USD 67 million (15%). Together, these three provinces represent close to half of all funding identified in the country. Excluding SIOC Community Development Trust, the geographical distribution of resources is concentrated in Western Cape (USD 71 million), Eastern Cape (USD 69 million) and Gauteng (USD 58 million). There is no clear relationship between the aggregate funding and the poverty incidence in each province, as measured by population living under the national poverty line: provinces with high poverty incidence and low poverty incidence have so far received similar levels of funding.

**Domestic philanthropy in South Africa provided an estimated USD 117 million to programmes supporting various aspects of gender equality in the country, corresponding to 27% of the total flows between 2013 and 2018.** Most domestic philanthropic funding towards gender equality is channelled through the education sector (mainly scholarships for higher education but also training and to a lesser extent early childhood education), with the aim of improving women's access to financial and productive resources. Moreover, a few foundations in South Africa provide support to other areas like access to justice or addressing violence against women, often as part of their human rights and social justice programmes.



Based on these findings, the report makes the following recommendations:

**Monitor the expansion of the non-profit sector.** More successful non-profits can have ripple effects beyond the sector. On the one hand, mandates to allocate resources through the non-profit sector can affect profitability and competition. On the other, they can position the sector to take over delivery of some public services.

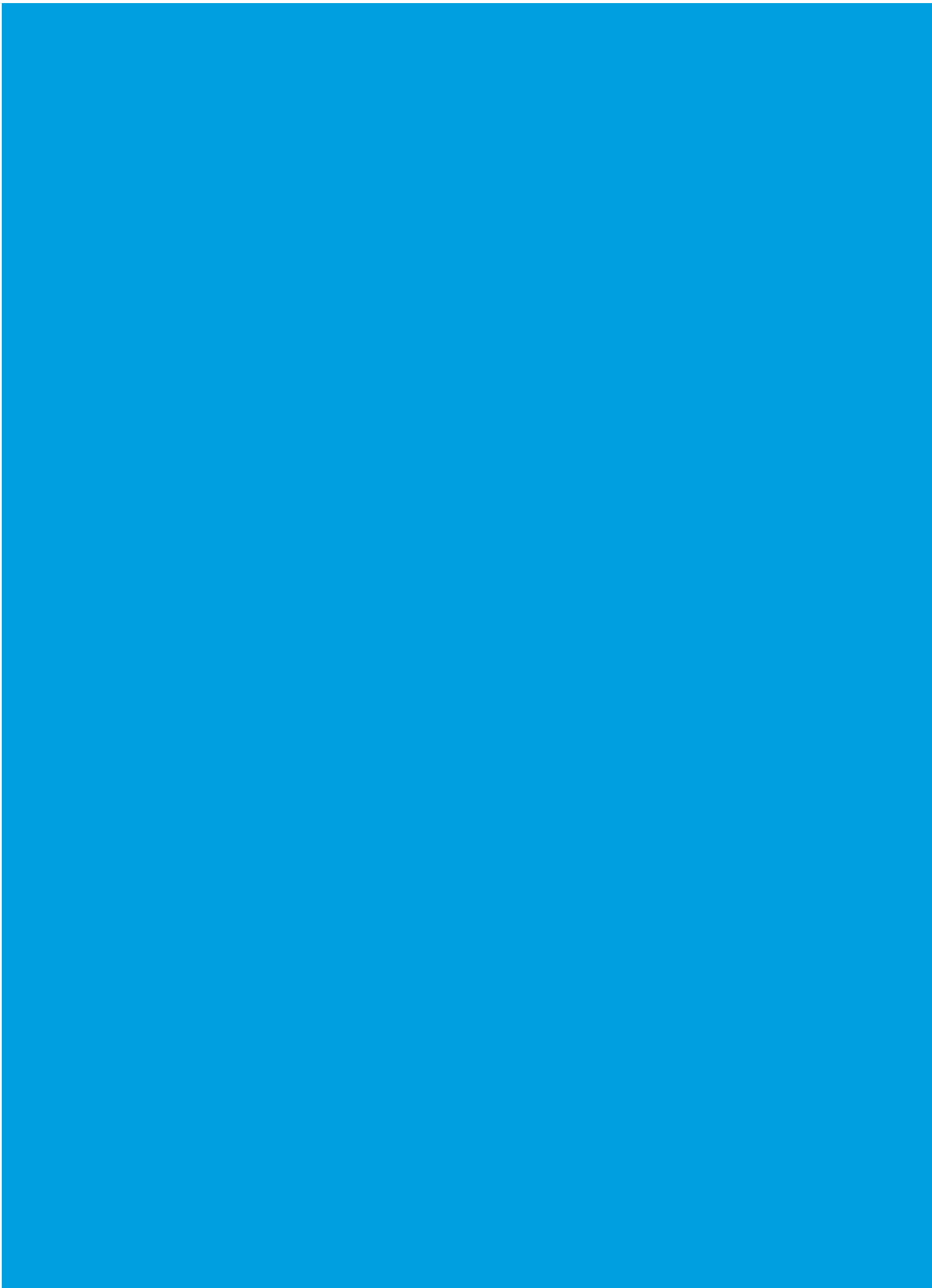
**Minimum reporting requirements can help improve transparency in the philanthropic sector.** Section 18 (1) (a) of the NPO Act (Act No. 71 of 1997) indicates that all NPOs must regularly share information with the Ministry of Social Development, but this information is not systematically made public. Disclosure of minimum information for tax-deduction eligible organisations should be considered. This can help organisations share information both with authorities and also among themselves, as well as improve public trust on domestic philanthropic organisations (OECD, 2020<sup>[50]</sup>). In addition, foundations and trusts that receive co-financing from public agencies should clearly distinguish private and public resources. More generally, they should move towards openly and regularly publishing project-by-project information.

**Partnerships between domestic and international philanthropic organisations working in South Africa, especially in education or human rights, could be scaled up through existing national and regional platforms.** National platforms, such as IPASA, could expand the exposure to international foundations by providing an opportunity for numerous international foundations investing in South Africa to be part of the platform (currently only foundations with offices in South Africa can become members). Second, South African foundations could consider joining some of the various pan-African networks (APN, APF, AVPA). Third, existing networks and loose groups of co-operating funders could consider strengthening their role as partnership brokers, especially in thematic areas with a high level of interest, such as education or human rights.

- **Investing in women's access to resources from an early age is a critical starting point to improve women's economic outcomes in the long term.** In South Africa, girls' have higher enrolment and attainment rates than boys, from primary to tertiary education. However, it is critical to ensure these gains persist. Philanthropic interventions (e.g. cash transfers, stipends, scholarship schemes) that lift financial barriers for families so girls can access and remain in school are a starting point to improve their economic outcomes in the longer run.
- **Beyond investments in scholarships and higher education, foundations could consider vocational and business management trainings to improve marketable skills and employment opportunities.** Large proportions of young women are out of schooling, training or employment in South Africa. While philanthropic flows for basic life skills for youth and adults attracted 69% of total domestic education funding between 2013-18, vocational training received only 2% of total domestic education giving. Evidence shows that vocational and business management trainings can improve women's marketable skills and business knowledge and help improve women's self-confidence and social skills by including soft- and life-skills modules.
- **Beyond interventions that seek to improve women's level of skills and education, programmes that grant women access to financial assets can improve their economic outcomes.** In South Africa, women continue to earn less, to work fewer paid hours, to be more likely to be unemployed and to be less likely to reach management positions in the public and private sector, compared to their male peers (ILO, 2019<sup>[51]</sup>). Various philanthropic interventions have the potential to improve women's economic opportunities. More information on effective economic empowerment programmes can be found in Annex F.
- **More research is needed to explore what works best and why to unleash women's economic empowerment by changing discriminatory social norms.** In South Africa, social expectations of men's financial dominance in the household, and binary gender roles that confine women to domestic responsibilities, remain prevalent and prevent women from advancing economically. Group-based interventions that stir critical reflection, communications campaigns using social or mass media and edutainment (a combination of education and entertainment) show promising results in changing social norms. Yet foundations need to invest more in exploring the impact of such programmes on women's economic empowerment and how they can be combined with traditional approaches such as trainings or stipends.
- **Further research is needed on how to overcome gender-based and race-based prejudices among financial service providers and employers.** Financial service providers have the capacity to improve women's economic situation by providing access to critical resources. If these providers

discriminate on the basis of gender and race, (Black) women will remain economically disadvantaged. Exploring approaches to reduce gender and race-based stereotypes may help level the playing field to sustainably improve all women's economic opportunities.

- **Domestic philanthropic organisations supporting social justice programmes with a gender equality angle should continue engaging with other private and public donors involved in that space.** Foundations, both domestic and international, may perceive advancing women's human rights as complex and sensitive. Indeed, women's rights programmes and projects often aim to challenge or disrupt political and social norms related to gender equality. This makes collaboration between different funders (domestic and international foundations but also official bilateral and multilateral donors) even more essential. A few domestic and international foundations working in this space in South Africa, already interact through a loose group of funders initiated by the Ford Foundation in 2017. Stronger collaboration could help create a trusted space for deepening knowledge about gaps, overlaps and effective approaches; devising joint advocacy; and leveraging co-funding for greater collective impact on long-standing and emerging women's human rights issues.



# 1\_Introduction



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## 1.1. Background and objective of the research

The focus of this study is two-fold: to close the knowledge gap on domestic philanthropy in South Africa and to provide an in-depth focus on domestic philanthropy's support to gender equality.

The study seeks to close the knowledge gap by consolidating open, reliable and comparable data and analysis on the scope, scale and diversity of domestic philanthropic flows. The globalisation of philanthropic donors brings approximately USD 8 billion of financing every year to low-income and emerging economies. South Africa stands as one of the countries that benefits the most from this funding, receiving annually close to USD 138 million from cross-border philanthropy (OECD, 2018<sub>[3]</sub>).

In recent years, researchers have attempted to estimate the size and scope of domestic philanthropy in South Africa (Bloch and Gastrow, 2016<sub>[4]</sub>); (Smith and Jennings, 2016<sub>[5]</sub>). This has brought attention to the sector and the knowledge gap in domestic philanthropy. Bloch and Gastrow (2016<sub>[4]</sub>) surveyed 21 foundations in 2015, placing their aggregate annual expenditure at approximately USD 49 million.<sup>1</sup> Meanwhile, Jennings and Ross (2016<sub>[5]</sub>) used data from 31 foundations, in addition to high net worth individuals (HNWI) and corporate social investment (CSI) available in 2014, to place annual donations at approximately USD 129 million.<sup>2</sup> Each of these studies used a different framework of organisations and individuals to estimate philanthropic giving. In both cases, voluntary participation from the side of donors proved to be a binding constraint, calling for more research in this area.

The study also provides an in-depth focus on domestic philanthropy's support to gender equality. Only a small proportion (less than 1%) of global philanthropic flows in low- and middle-income countries directly addressed women's needs like preventing violence or supporting women's rights organisations (OECD netFWD, 2019<sub>[6]</sub>). South Africa has made important advances towards gender equality in recent years. This includes a solid legal framework to redress long-standing inequalities in multiple areas of women's lives. However, challenges persist, particularly in unpaid care work, gender-based violence and access to justice.

The study's ultimate aim is to provide data and analysis that will help foundations, both domestic and international, make more informed decisions, and to identify and engage with peers working on similar issues. It will also benefit other development stakeholders working in or with South Africa, ranging from non-profits seeking philanthropic funding to official donors that may wish to co-ordinate and/or partner with foundations. In addition, it could interest the media and citizens who may wish to know more about philanthropy's role, potential and activities.

The OECD Centre on Philanthropy carried out the study in collaboration with the Independent Philanthropy Association of South Africa (IPASA). It is part of the Centre's research in five emerging economies (Colombia, India, Nigeria, The People's Republic of China and South Africa), which aims to shed light on domestic philanthropy's contribution to development and to suggest recommendations to address critical issues outlined in Agenda 2030.

1. R763.8 million at a 15.55 USD/Rand nominal exchange rate.

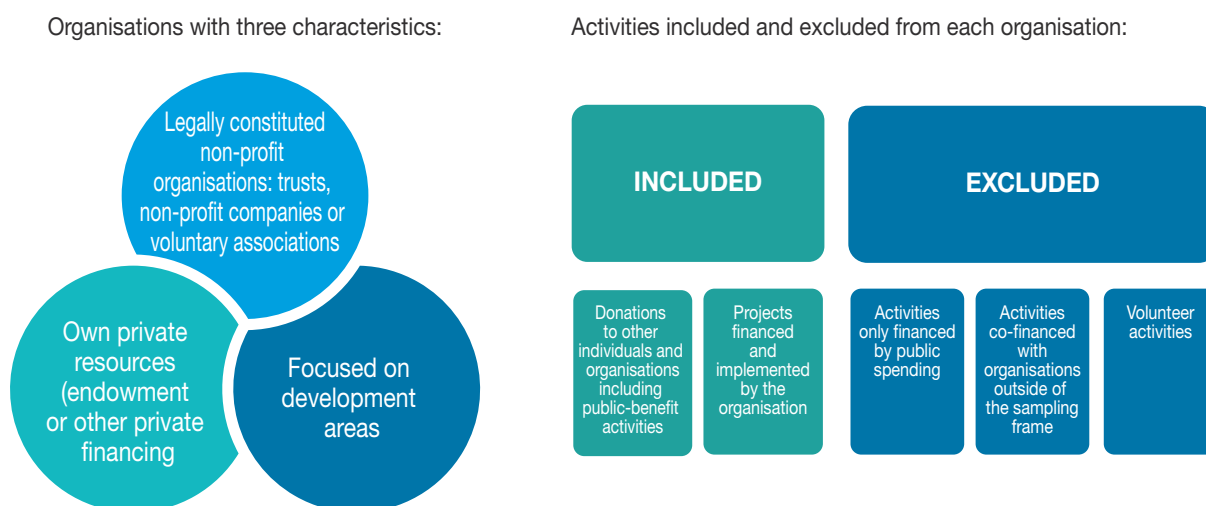
2. R2 billion at a 15.55 USD/Rand nominal exchange rate.

## 1.2. Sample and methodology

### Sample frame

The report is based on a survey by the OECD between September 2019 and September 2020. The organisations invited to participate comprise all legally constituted non-profit organisations that own private resources and provide grants, donations or develop projects in areas relevant to economic and social development (OECD, 2018, p. 31<sup>[3]</sup>).

Figure 1.1. Sample frame for OECD survey in South Africa



There is no specific legislation for philanthropic entities in South Africa. Organisations that provide donations or operate philanthropy-related projects are often named either foundations or trusts. They can be registered via a number of different legal structures within the non-profit sector. Therefore, the organisations selected for the sample were: i) trusts;<sup>3</sup> ii) non-profit companies (NPC);<sup>4</sup> or iii) voluntary associations.<sup>5</sup> These organisations, in turn, can have two statuses as legal charity vehicles: i) non-profit organisation (NPO); and ii) public benefit organisation (PBO). Any organisation created for public good that is not part of the government can be registered as an NPO through the national Department of Social Development. Meanwhile, the Tax Exemption Unit of the South Africa Revenue Service (SARS) grants PBO status. The SARS is mandated by the Income Tax Act of 1962 to exempt organisations from income tax if they carry on no, or limited trading, activities, and receive donor-deductible contributions and other tax provisions.<sup>6</sup>

Beyond legal status, philanthropic entities in South Africa can be classified in two broad categories according to their source of funding and level of independence:<sup>7</sup> i) individual or family foundations (often established as trusts with an independent board of trustees); and ii) corporate foundations and corporate investments. On the corporate side, there are three broad subcategories: (a) community trusts with generally little overlap with the corporate funder interests (quasi-independent); (b) corporate foundations independent from the corporate sector in terms of governance but aligned to the corporate interest of the company in terms of thematic or geographic areas of giving; and (c) direct CSI by companies (without a separate philanthropic entity).

The survey targeted an initial sample of 71 organisations, which were identified through membership to the Independent Philanthropy Association of South Africa (IPASA) and secondary research. Not all the organisations from this population were part of the sampling frame. The survey excluded 16 organisations that were either fully funded through contracts with the public sector, including some BBE trusts. It also excluded organisations that could not demonstrate private resources of their own, including non-governmental organisations (NGOs) with multiple sources of funding. In addition, CSI funding was excluded, as CSI is not carried out through legally

3. Non-profit trusts are governed by the Trust Property Control Act of 1988, and are “established when ownership of a property or funds is transferred (by written agreement, testament or court order) to another party or group, who will administer the assets for the benefit of others or to achieve a specific goal”.

4. The Non-Profit Company (NPC) is governed by the Companies Act of 2008 (The Act). The Act states that this type of company must be “incorporated for public benefit” and “the income and property of which is not distributable to its incorporates [...]”.

5. Voluntary associations can be formed, verbally or in writing, when two or three people agree to work together towards non-profit objectives.

6. For instance, exemptions from transfer duty, estate duty, capital gains, donations tax, the skills development levy and dividends tax.

7. The concept of independence relates to independence from government and the corporate sector in terms of governance.

constituted non-profit organisations. From the remaining group, a non-random stratified sample was used to invite the largest organisations to participate in the survey. It used replacement when organisations invited did not fit the sampling frame or declined to participate.

### Surveys underpinning the study

The OECD deployed two surveys. First, an organisational survey captured several dimensions of the organisations' set-up. Second, a grant survey covered grants and donations of each organisation to other people or other organisations, as well as projects financed with own funds, profits or loans (OECD, 2018, p. 29<sup>[21]</sup>). The grant survey uses the OECD's Development Assistance Committee (DAC) Creditor Reporting System (CRS) functional classification of allocations (OECD, 2019<sup>[71]</sup>). As such, it gathers detailed grant information under standards that allow comparisons with other financing for development channels, such as official development assistance (ODA). Some activities were excluded from the grant survey. These included activities solely financed by the public sector, through a non-profit organisation or government procurement; activities financed by other non-profit organisations that were not included in the survey sample; and volunteer activities that did not represent an explicit expenditure on behalf of the organisation, e.g. company employees carrying out non-remunerated volunteering activities (Figure 1.1).

### Survey uptake and response rate

In total, 31 organisations (Annex B) replied to the OECD survey in its entirety (organisational survey and grant survey) (Table 1.1). Most of these organisations are trusts (24 respondents), while 6 are NPCs.

Table 1.1. OECD survey uptake in South Africa

Survey	Invited to participate (1)	Excluded (outside sample frame) (2)	Included (within sample frame) (3) = (1) – (2)	Response rate (4)
Organisational survey	71	16	55	55
Grant survey	71	16	55	31
<b>Effective response rate</b>				<b>64%</b>

### Estimates of funding towards gender equality

In global philanthropy for development, an estimated 16% of all financing was aimed at improving gender equality between 2013 and 2015. However, only a small proportion (less than 1%) went directly to address women's needs like preventing violence or supporting women's rights organisations (OECD netFWD, 2019<sup>[6]</sup>). To clarify how foundations are contributing to gender equality, the survey introduced a new measure. It sought to identify how philanthropy supports dimensions that are known determinants and drivers of gender equality.

This measure is based on the OECD's Social Institutions and Gender Index (SIGI). This index aims to track the presence and influence of discriminatory social norms, attitudes and practices that disadvantage women and girls relative to men and boys across four dimensions: i) discrimination in the family; ii) restricted physical integrity; iii) restricted access to productive and financial resources; and iv) restricted civil liberties (OECD, 2019<sup>[8]</sup>). Each gender-related project from the foundations sampled was classified based on the above dimensions. This provides a more granular view of philanthropic efforts towards gender equality by focusing on the channels used to achieve gender equality (see Annex D).

### 1.3. The context of philanthropy in South Africa

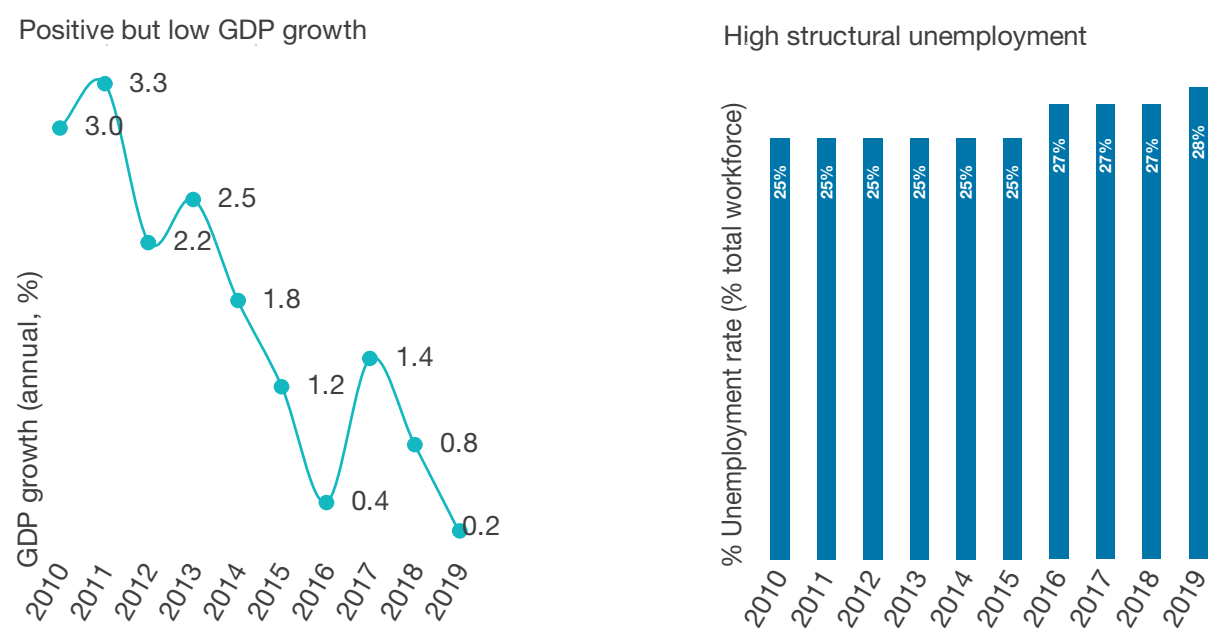
To grasp the role of philanthropic financing towards development in South Africa, the country's recent evolution in terms of economic growth, inequality, poverty reduction, inflows of ODA and recent developments in the regulation of the non-profit sector can help put private philanthropic financing within a broader context.

#### With high structural unemployment and inequality, South Africa faces significant social and economic challenges

South Africa has had stable but low economic growth for the past decade, averaging 1.7% of real gross domestic product (GDP) growth between 2010 and 2019 (World Bank, 2020<sub>[9]</sub>). In addition, South Africa remains one of the countries with the highest levels of income and wealth inequality, while the overall level of inequality remains high despite important social transfers (OECD, 2020<sub>[10]</sub>). High structural unemployment, above 25% for over a decade and increasing over the past few years, poses significant economic and social challenges to the country (Figure 1.2).

Given high unemployment, a substantial amount of the population's income is derived from government social grants. Each month, approximately 17 million people receive these grants, which benefit close to half of all households in the country (STATS SA, 2019<sub>[11]</sub>). The values range from R430 for the Child Support Grant, provided to caregivers of children with low incomes, to R1780 for the state pension. South Africa's child support grant is one of the largest unconditional cash transfer programmes for children in the world (OECD, 2020<sub>[10]</sub>). Given these social indicators, Statistics South Africa estimates that 55% of South African households live below the national upper bound poverty line, which corresponds to an amount of money required per month to satisfy basic food and non-food needs (STATS SA, 2019<sub>[11]</sub>).

Figure 1.2. Economic growth and unemployment in South Africa, 2010-19



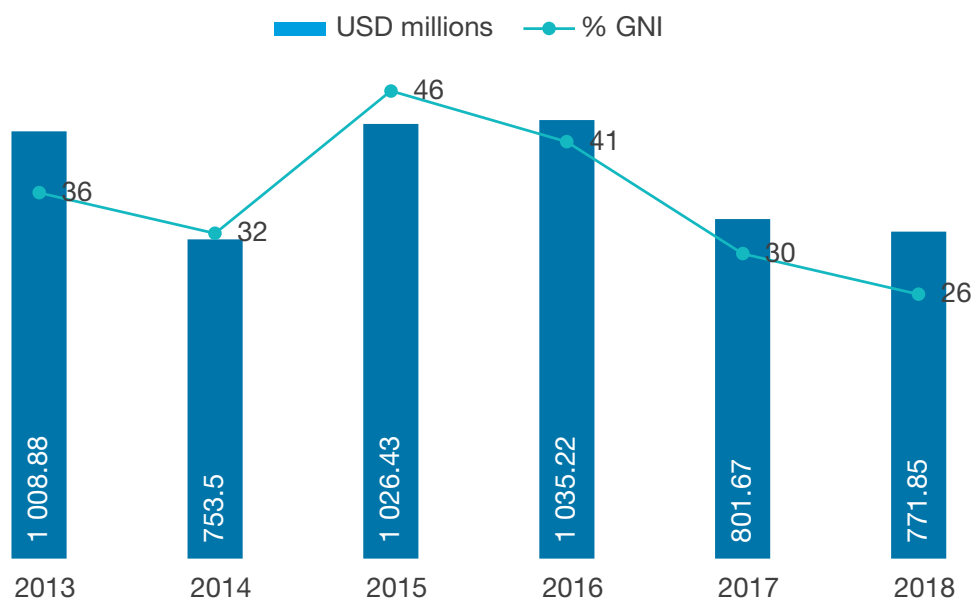
Source: OECD based on World Bank, 2020<sub>[7]</sub>.

#### Official development assistance to South Africa has decreased in recent years

South Africa is one of the least aid-dependent countries in Africa, but official bilateral and multilateral assistance remains an important source of financing, particularly in the health sector. ODA represented 36% of GNI in 2013, but by 2018 it had decreased to 26%. Net incoming resources towards the country have decreased, reaching USD 772 million in 2018 (Figure 1.3).



Figure 1.3. Net ODA from DAC countries to South Africa, 2013-18



### The scope of activities and the diversity of entities within the non-profit sector have expanded through a few key regulations

The evolution of philanthropy in South Africa has been driven by state-led efforts to regulate and incentivise philanthropic activities from the corporate sector. Over the past two decades, the country has introduced a few policies that directly relate to the scope of philanthropy for development: Broad-Based Black Economic Empowerment (B-BBEE), NPCs and the Renewable Energy Independent Power Producer Procurement Programme (REIPPPP).

#### Broad-Based Black Economic Empowerment

The BEE Act of 2003 aims to provide incentives for large businesses to contribute to the state's efforts to combat the systematic exclusion of the Black population from the formal economy. Under this scheme, businesses can bring in Black shareholders, managers and suppliers. At the same time, they provide skills training to youth and support to small businesses by allocating 1% of net after-tax-profits on developmental initiatives. Performance across each component is measured through a B-BBEE scorecard – a tool widely used by companies to show their contributions and by the government to monitor compliance. While involvement is voluntary, non-compliance can lead to the exclusion of companies from business with the state, or with other companies that do business with the state.

Companies can improve their B-BBEE scorecard performance by establishing a BEE trust that is fully, or partly owned, by the Black population. Also, a community trust established by a sponsor company that works with community organisations for a defined public benefit activity such as education can be used to fulfil the 1% spending on community development.

#### Non-profit companies

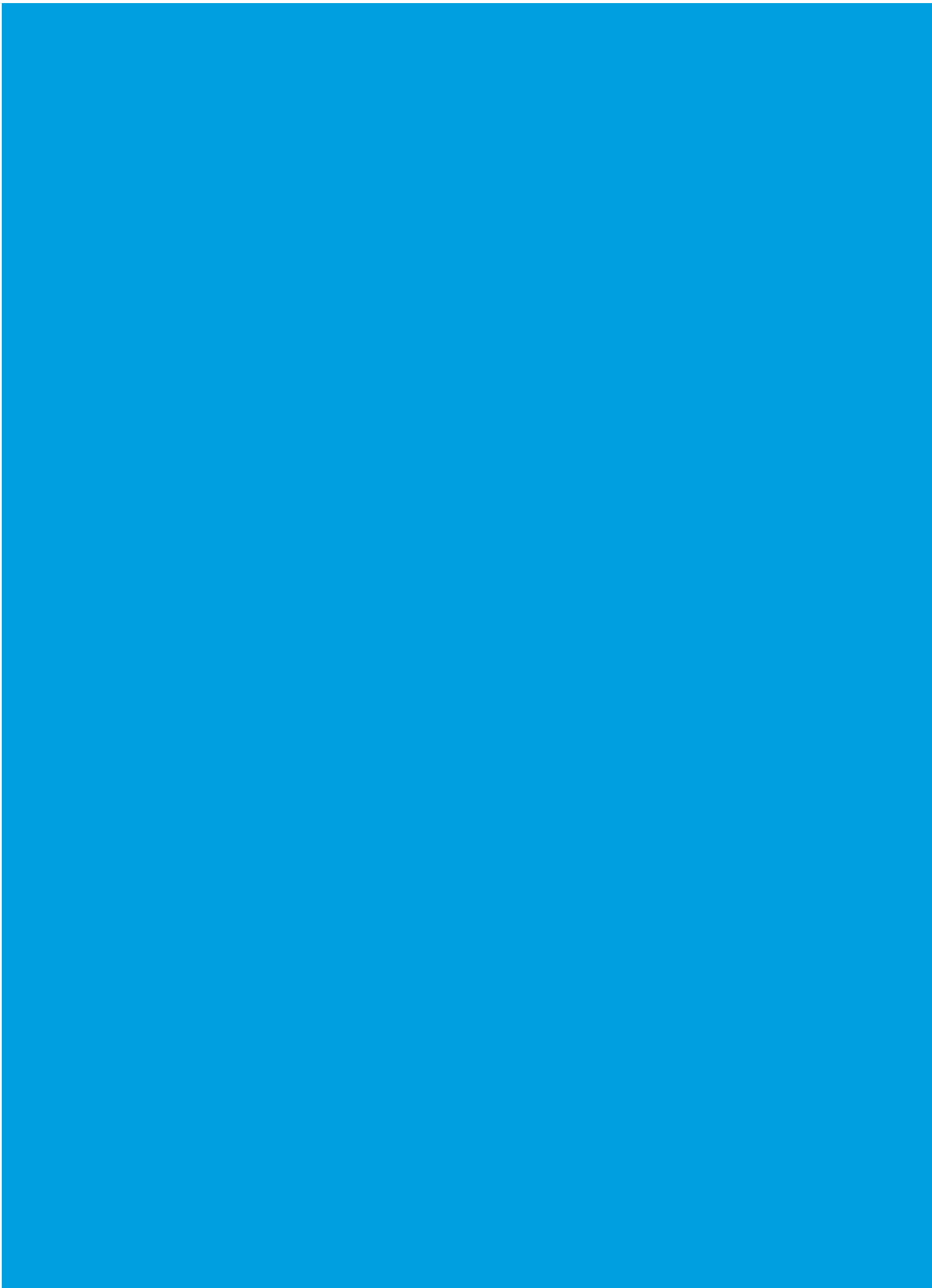
South African law (Schedule 1 of The Companies Act 71 of 2008) describes an NPC as a company incorporated for public benefit, or other object relating to one or more cultural or social activities, or communal or group interests. It is identified by the abbreviation “NPC” at the end of a company name.

#### Renewable Energy Independent Power Producer Procurement Programme

REIPPPP, initiated by the Department of Energy in 2011, aims at expanding the country's energy mix to include renewable forms of energy, reducing coal dependence so it can improve the capacity of the national grid. BEE legislation applies to REIPPPP producers as well, who are required to spend 1% of net after-tax-profits on community development initiatives within a defined radius of the producer's operations. One commonly used

mechanism is the establishment of an REIPPPP trust that manages these resources, broadly similar to the BEE trusts. As of 2019, more than 100 approved producers have, by government's estimation, spent more than R1 billion (approximately USD 60 million) on community development initiatives. As with BEE trusts outside the energy sector, the bulk of this spending has been geared towards education: the building of school infrastructure such as classrooms and libraries, and developing scholarship programmes for higher education (Independent Power Producer Procurement Programme, 2020).

BEE, NPCs and REIPPPP trusts do not represent philanthropy in the traditional sense. However, in some cases they effectively represent private organisations that invest in development areas. They thus fall within the purview of the OECD definition of philanthropy for development (Annex A).



# 2\_Philanthropy for development in South Africa



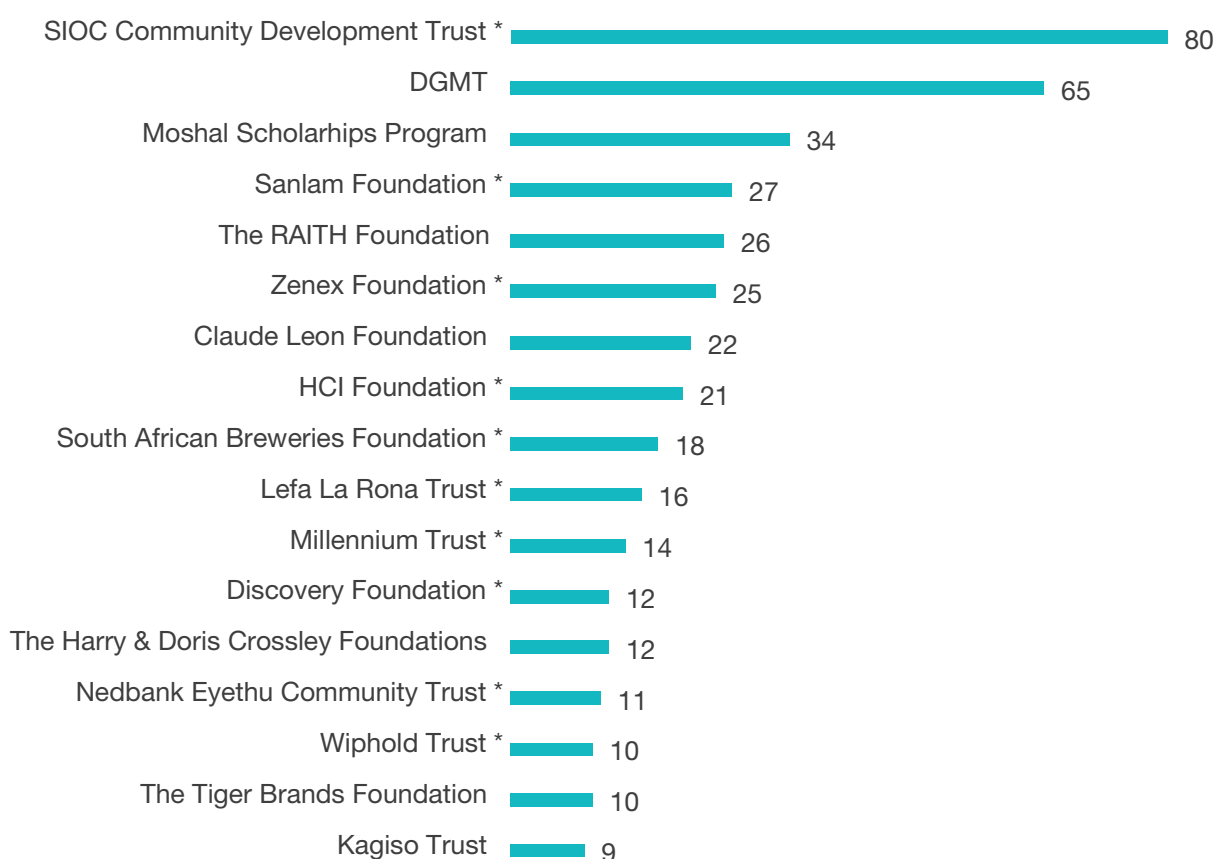
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## 2.1. South Africa philanthropic financing

### Domestic philanthropy in South Africa is predominantly corporate, but there is also large individual and family giving

Funding compiled by the OECD from 31 organisations amounted to approximately USD 454 million between 2013 and 2018, averaging USD 76 million annually. A few foundations generated most of the funding during this period, with the largest five organisations representing 51% of total funding. SIOC Community Development Trust was the largest funder between 2013 and 2018, with approximately USD 80 million (18% of total). It was followed by DGMT with USD 65 million (14%) and Moshal Scholarship Program with USD 34 million (7%) (Figure 2.1). From the top 15 domestic foundations, 75% of all funding comes from various types of corporate foundations, while the other 25% is distributed between family foundations and other organisations.

Figure 2.1. Top 15 philanthropic funders in South Africa, 2013-18



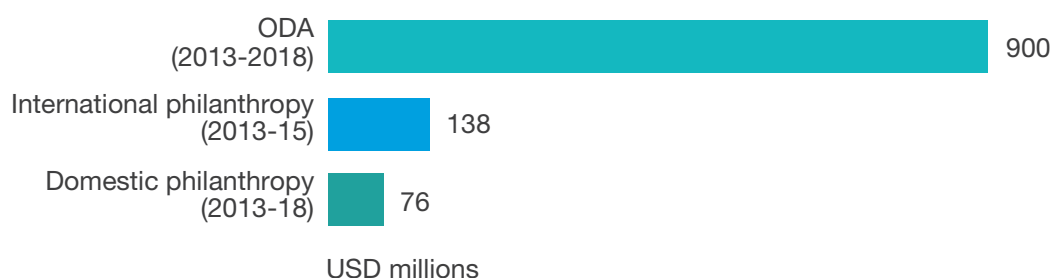
Note: \* Corporate foundations.

### Domestic philanthropy remains lower than international philanthropy and modest when compared to ODA

Domestic philanthropy represents around 8% of net ODA flows, amounting, on average, to USD 900 million annually between 2013 and 2018 (Figure 2.2). In recent years, the largest proportion of ODA towards South Africa was allocated towards health programmes, predominately financed by the United States.

Domestic philanthropy represents around half of yearly international philanthropy. International foundations allocated on average USD 138 million annually to programmes and organisations in South Africa between 2013 and 2015.

Figure 2.2. **Yearly average ODA, international and domestic philanthropic financing in South Africa, 2013-18**



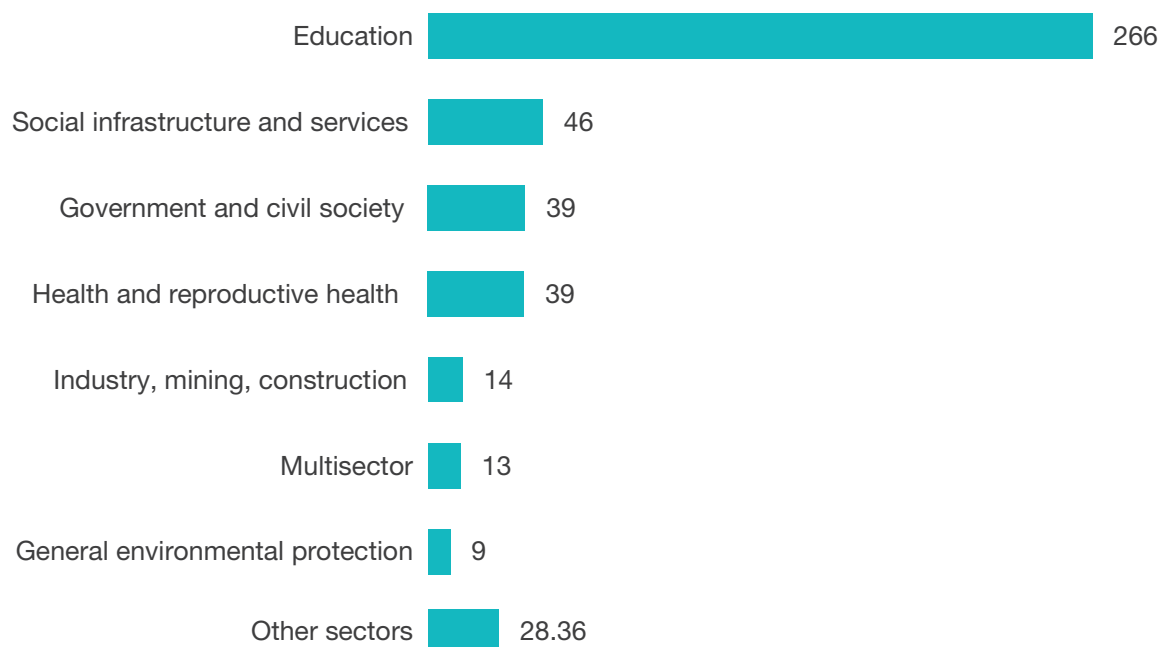
Note: Domestic philanthropy includes 31 domestic for 2013-18, while cross-border philanthropy corresponds to international foundations for 2013-15.

## 2.2. Sectoral and geographical distribution of philanthropic financing

### Over half of domestic philanthropic funds are directed towards the education sector

South African organisations focus their financial efforts in the education sector, which accounts for USD 266 million (58% of all financing identified between 2013 and 2018). This was followed by social infrastructure with USD 46 million (11% of total) and governance and the civil sector<sup>8</sup> with USD 39 million (9% of total) (Figure 2.3).

Figure 2.3. **Sectors financed by domestic philanthropy in South Africa, 2013-18**



8. According to the OECD-DAC sectoral classification, the government and civil society sector refers to activities aimed at strengthening the administrative apparatus and government. This includes, for example, human rights, democratic participation and civil society development, media and free flow of information, legal and judicial development, support to women's equality organisations, ending violence against women and girls, and conflict prevention and resolution.

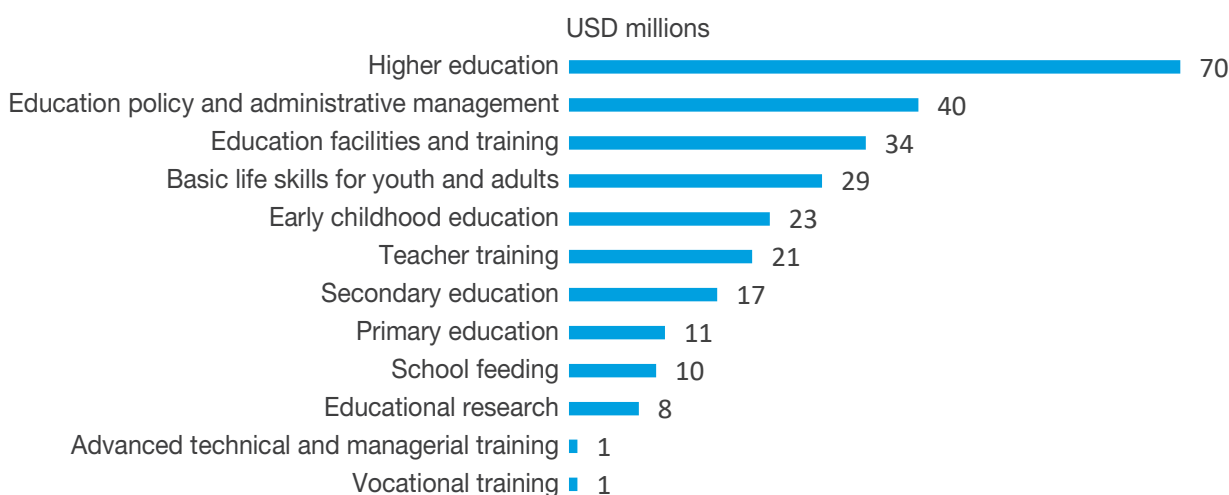
### Philanthropic funding for education predominately supports higher education but also basic skills

Almost all organisations surveyed work in education, as 28 of 31 foundations provide a total of USD 266 million financing in this space. The three largest donors account for almost half (46%) of total funding for education over 2013-18 (DGMT with USD 48 million, SIOC Community Development Trust with USD 39 million and Moshal Scholarship Program with USD 34 million).

Support to higher education, mainly through scholarships, represents USD 70 million over 2013-18 and approximately 27% of all funding identified in education. This is driven mainly but not only by large funding from the Moshal Scholarship Program (USD 33.6 million) with another 20 organisations providing support to higher education. Within the education space, organisations also fund education infrastructure and target basic life skills for both youth and adults (Figure 2.4).

Domestic foundations working in the education space communicate and share information through thematic funders' groups. For example, a consortium of donors brings together both foundations and service providers to support early childhood development (ECD). Meanwhile, an informal bursary group of foundations supports scholarships.

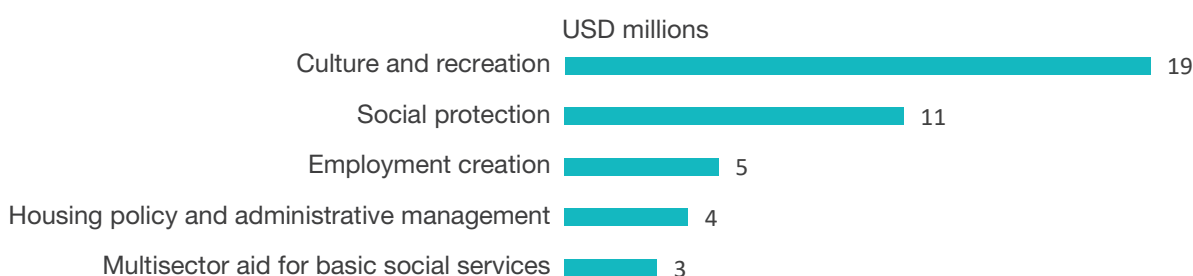
Figure 2.4. Funding in education, 2013-18



### Social infrastructure spending is directed towards community centres, cultural development and care for the elderly

Social infrastructure spending is the second most-funded sector, with USD 46 million over 2013-18 provided mostly by two large donors: SIOC Community Development Trust and DGMT. Social infrastructure spending includes financing to cultural centres and sporting facilities (USD 19 million).<sup>9</sup> It also goes towards the maintenance and development of social infrastructure in the form of centres that serve the elderly, children in poverty or other vulnerable populations (Figure 2.5). A few organisations, particularly trusts, are financing programmes aiming at improving the labour market in South Africa.

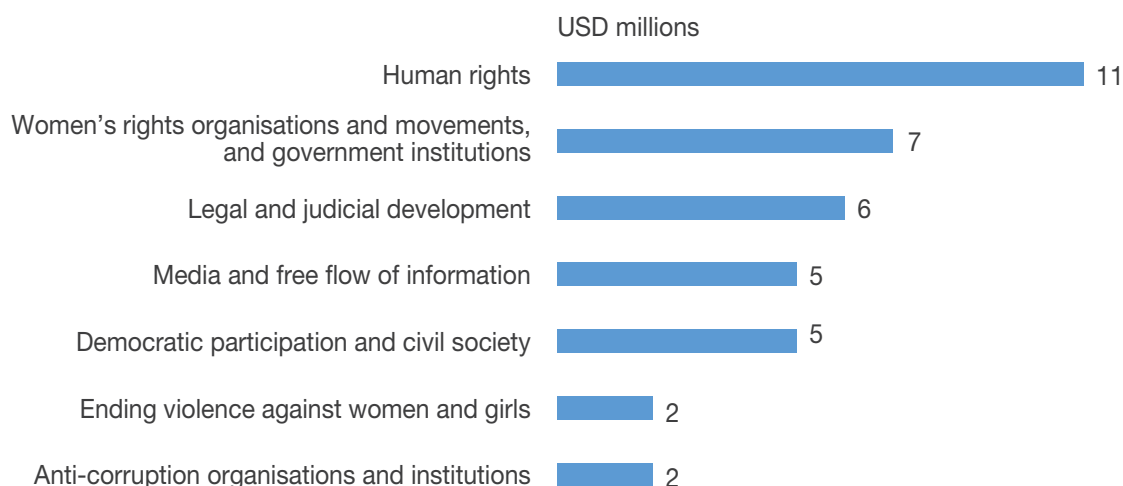
Figure 2.5. Funding in social infrastructure, 2013-18



## Funding towards human rights and women’s rights organisations is significant in the civil society space

Total funding towards governance and civil society, the third most-targeted areas by domestic foundations in South Africa, amounted to USD 39 million between 2013 and 2018 (Figure 2.6). The funding was provided by 13 foundations, with the Claude Leon Foundation and the RAITH Foundation as the two largest donors. Domestic foundations working in this area support human rights organisations (including women’s rights organisations) and access to justice, as well as anti-corruption efforts, democratic participation and the media.

Figure 2.6. Funding in governance and civil society, 2013-18



## In 2018, funding from international and domestic foundations overlapped in education, as well as on governance and the civil society sector

Based on 2018 data from 20 international foundations working in South Africa<sup>10</sup> and 31 domestic foundations, significant overlap exists between international and domestic philanthropy in a few sectors (Figure 2.7). Education, governance and the civil society sector are top priorities for both domestic and international foundations. International philanthropy allocated USD 26 million to education (second most-funded sector) and USD 14 million to government and civil society (third most-funded sector). South Africa is also the world’s fourth largest recipient of international philanthropic funding for human rights (OECD, 2018<sub>[3]</sub>). Domestic philanthropy allocated USD 41 million to education (first most-funded sector domestically) and USD 6 million to government and civil society (fourth most-funded sector) in 2018.

Some collaboration platforms at national and regional level provide an opportunity for interaction between domestic and international foundations. At national level, IPASA brings together both domestic and international foundations. However, membership is limited to international funders with an office in South Africa. These include Ford Foundation, MasterCard Foundation, Charles and Steward Mott Foundation, Elma Philanthropies, Michael & Susan Dell Foundation, and Roger Federer Foundation.

Relatively few foundations from South Africa (mainly individual and family foundations) are involved in regional (pan-African) networks of foundations such as Africa Philanthropy Network (APN), the Africa Philanthropy Forum (APF) or the African Venture Philanthropy Alliance (AVPA). A loose co-ordination group brings together domestic foundations (RAITH Foundation, Claude Leon Foundation) and international foundations (Ford Foundation, Bloomberg, Elma Philanthropies) to support social justice programmes (governance and civil society), including

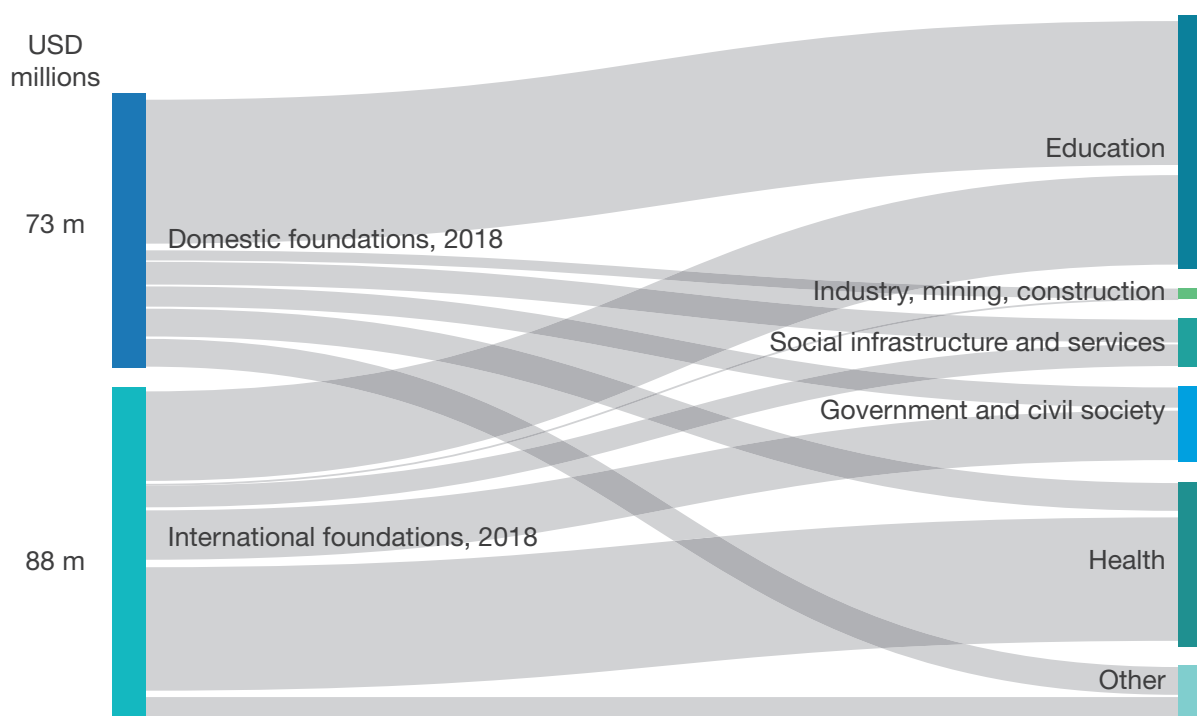
9 All domestic spending on culture and sporting financed by domestic foundations was included in this report. OECD-DAC methodology delineate boundaries of cross-border spending in the area of culture that can be counted as ODA. Development-oriented social and cultural programmes that provide basic facilities or training to enhance the social and cultural development of nationals of developing countries are eligible as ODA, but one-off tours by donor country artists or sportsmen, and activities to promote the donors’ image, are excluded. The former exclusion criteria cannot be applied to domestic funding (OECD/DAC, 2018, p. 24<sub>[92]</sub>).

10 According to the OECD Creditor Reporting System, 20 foundations allocated funding in South Africa in 2018: Arcus Foundation, Bill & Melinda Gates Foundation, Charity Projects Ltd (Comic Relief), Children’s Investment Fund Foundation, Citi Foundation, Conrad N. Hilton Foundation, Dutch Postcode Lottery, Ford Foundation, John D. & Catherine T. MacArthur Foundation, LEGO Foundation, MasterCard Foundation, Michael & Susan Dell Foundation, Oak Foundation, Omidyar Network Fund, Inc., People’s Postcode Lottery, Rockefeller Foundation, Swedish Postcode Lottery, Wellcome Trust, William & Flora Hewlett Foundation and World Diabetes Foundation.



the issue of gender-based violence. In addition, several collaboration and co-funding projects between domestic and international foundations emerged in the past few years, mainly as a result of bilateral relations. In 2018, for instance, the Michael & Susan Dell Foundation provided USD 1.1 million in a funding partnership with DGMT to support education initiatives, while Charity Projects Ltd (Comic Relief) provided a grant to the Nelson Mandela's Children Fund.

Figure 2.7. Domestic and international philanthropy in South Africa, 2018

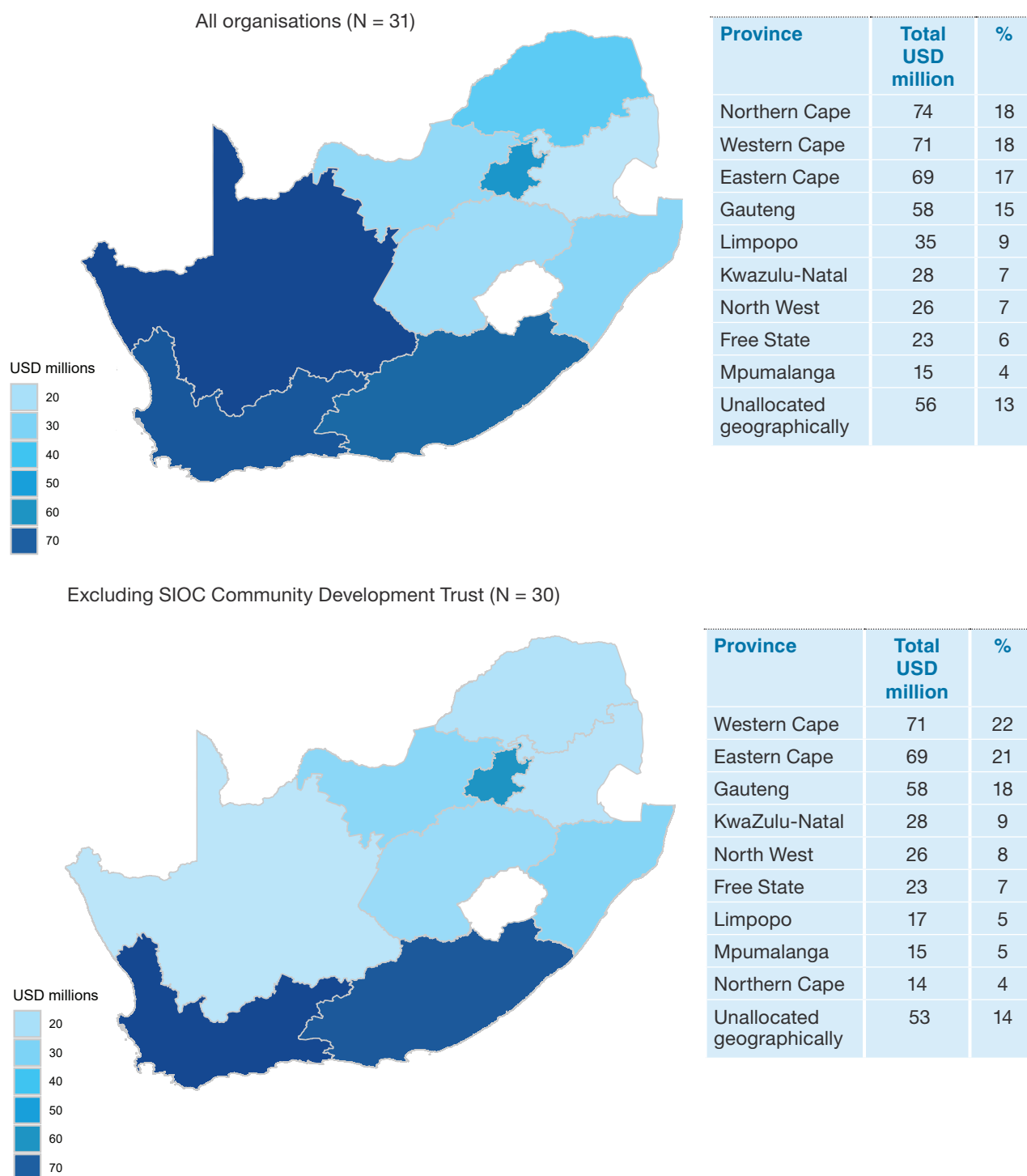


### Funding is highly concentrated in a few provinces, mainly Northern Cape, Western Cape and Eastern Cape

The funding identified is concentrated in dense urban areas and where corporate foundations operate (Figure 2.8). Northern Cape province received the most funding (18% of total) with close to USD 74 million due to large donations by SIOC Community Development Trust. It was followed by Western Cape and Eastern Cape.<sup>11</sup> Together, these three provinces represent close to 56% of all funding in the country. Excluding SIOC Community Development Trust, most funding from the other 30 organisations is concentrated in Western Cape (USD 71 million), Eastern Cape (USD 69 million) and Gauteng (USD 58 million). This concentration follows a similar pattern as international philanthropic financing for development and other countries, such as India, where resources tend to be deployed in the area of economic interest of the parent company (OECD, 2019<sub>[12]</sub>).

11. Approximately 87% of all resources identified have a geographical dimension within South Africa. Based on estimates of the funding allocated to each province from each programme or activity, the geographical distribution of total funding at the province level can be estimated. Given that many foundations did not have readily-available distributions of their funding by province, the OECD prorated their financing, in equal proportions, among all provinces indicated (Annex D).

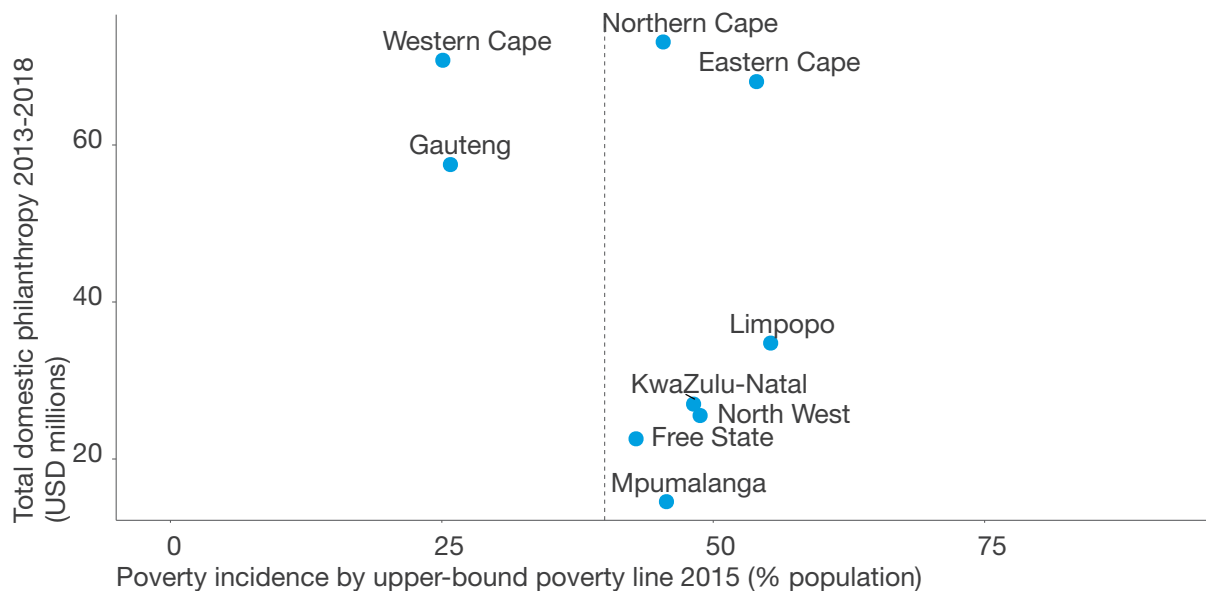
Figure 2.8. Estimates of geographical concentration of philanthropic financing in South Africa, 2013-18



Moreover, there is no clear relationship between the aggregate funding from donors and the poverty incidence in each province, as measured by population living under the upper bound of the poverty line: provinces with

relatively high poverty incidence, such as Limpopo and Eastern Cape, received significantly different funding from surveyed organisations (Figure 2.9).

Figure 2.9. Poverty and geographical distribution of philanthropic financing in South Africa



Note: Dashed vertical line represents national poverty incidence rate at 40% in 2015.

Source: OECD calculations based on (STATS SA, 2018, p. 18<sub>[13]</sub>).

## 2.3. Non-financial support, beneficiaries and evaluation practices of domestic philanthropy

### Non-financial support is a key feature of philanthropic donors in South Africa

The predominant financial tools used by domestic philanthropy are grants, with 23 organisations using this funding channel, followed by awards and loans (Figure 2.10). Next to financial support, domestic philanthropic organisations display a wide array of non-financial support for their beneficiaries or grantees. Specifically, 20 of 31 foundations supported financial education or financial management, including access to networks and managerial training.

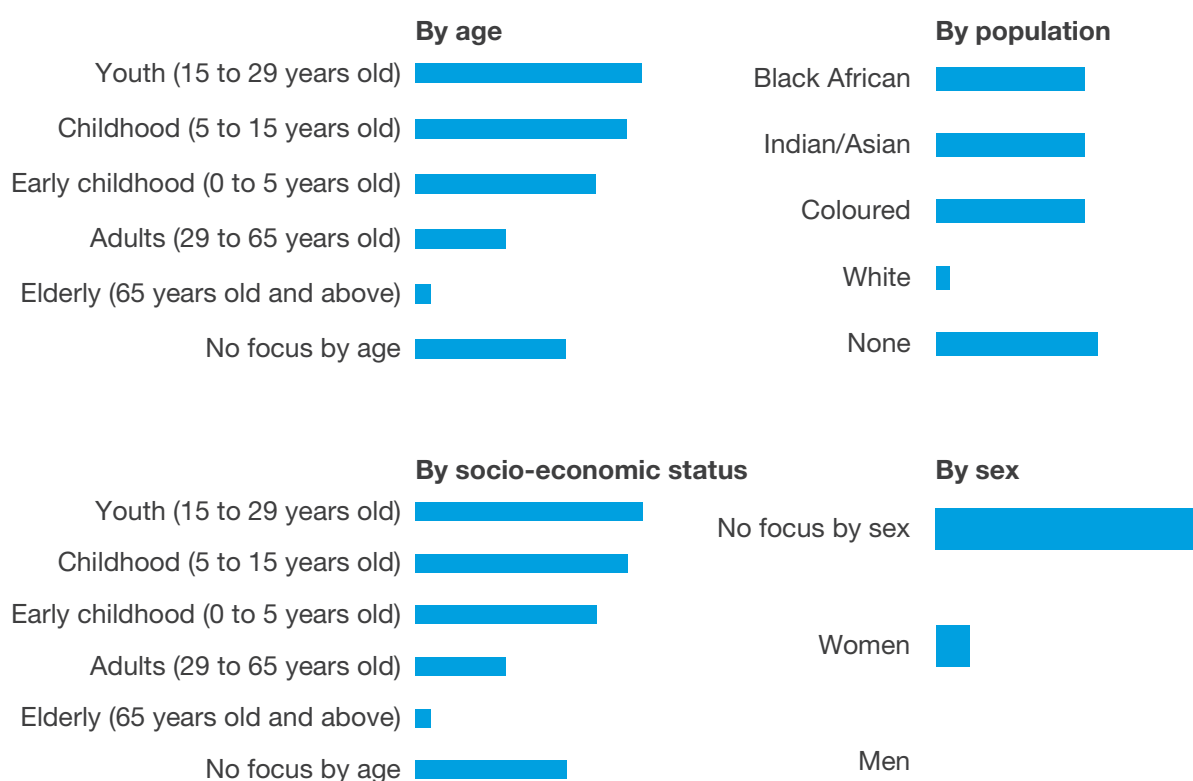
Figure 2.10. Financial and non-financial support by domestic philanthropic organisations



## Most domestic philanthropic organisations target population living in poverty and youth

Organisations surveyed predominately target youth, which can be explained by the large proportion of funding allocated in the education sector. Moreover, funders for the most part support projects and grantee beneficiaries irrespective of their gender. In all, 24 organisations did not distinguish on this dimension, and only 3 domestic philanthropic organisations focused on programmes that explicitly benefit women: Alexander Forbes Community Trust, Distell Development Trust and SAB Foundation. With respect to the socio-economic status of beneficiaries, 23 of 31 surveyed foundations focused interventions on populations living in poverty or facing unemployment (Figure 2.11).

Figure 2.11. Populations targeted by foundations in South Africa



## Information sharing is limited, but foundations are increasingly turning to impact evaluations for learning

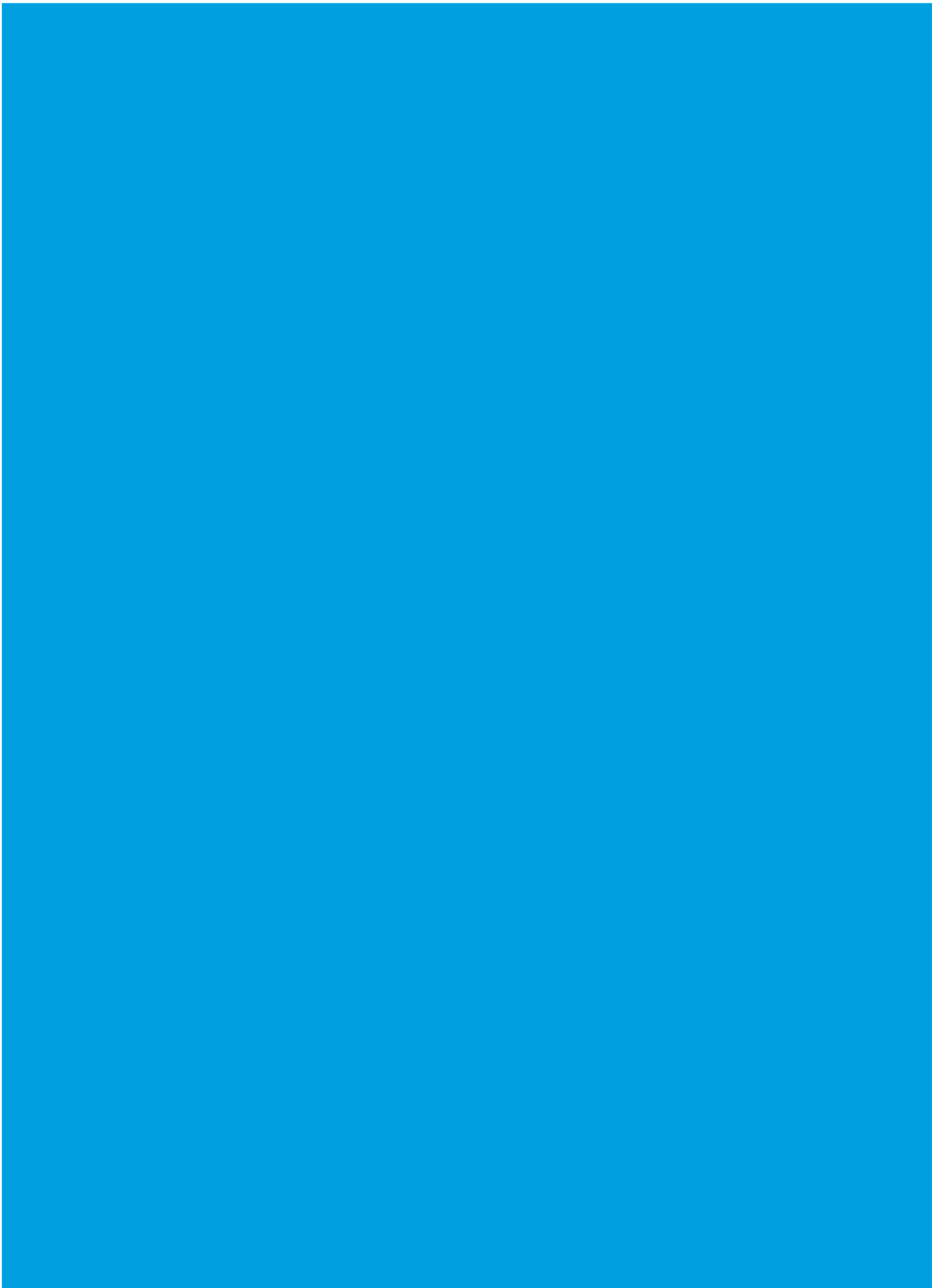
Transparency is not yet the norm in the sector, as donors in South Africa do not readily disclose information about their programmes, beneficiaries and financials. While trusts, NPOs and NPCs are obliged to file regular reports with the government (Government of South Africa, 1997<sup>[14]</sup>), this information is not readily or publicly available. Even though philanthropic organisations almost always produce an annual report, the contents of these reports vary widely. Most organisations publish aggregate information about their operations, with some regularly publishing annual reports and information about their grants and projects. However, financial reporting is extremely scarce: only 3 of 31 surveyed domestic philanthropic organisations publish information about their grants on their websites (Figure 2.12).

Figure 2.12. **Transparency and information sharing (number of foundations)**

Domestic philanthropic organisations, particularly those that implement projects directly, regularly monitor and evaluate their programmes (Figure 2.13). They also carry out cost-benefit analysis of their programmes. Moreover, a few indicate developing experimental evaluations, which indicates a growing learning culture within the philanthropic sector in South Africa. Nevertheless, little of this information is openly shared with other donors or the general public.

Figure 2.13. **Learning and evaluation (number of foundations)**





# 3\_ Domestic philanthropy for development and gender equality in South Africa



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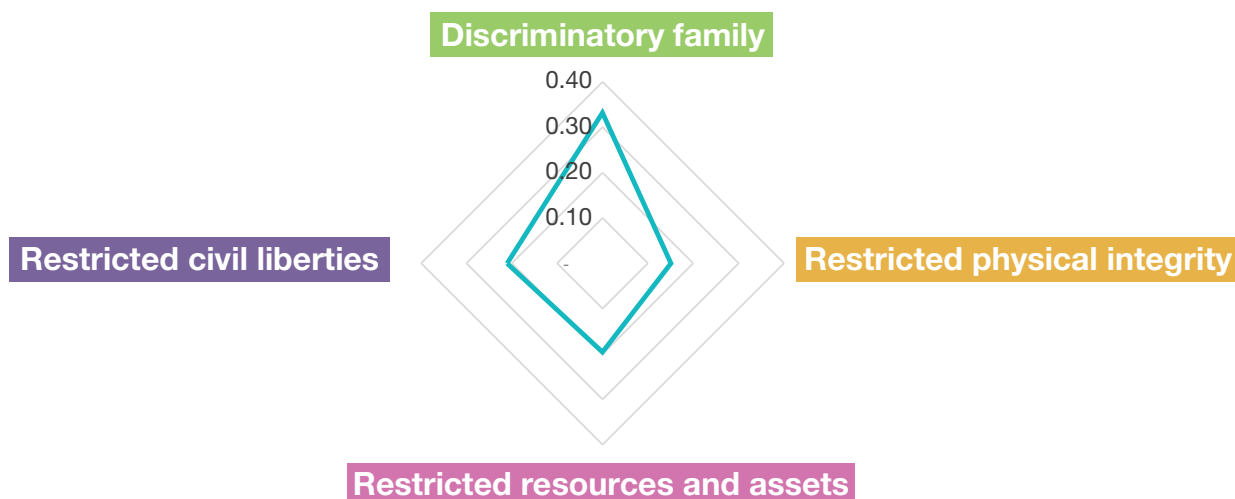


### 3.1 Gender equality in South Africa: Progress and challenges

#### South Africa has a relatively low level of gender discrimination in social institutions

South Africa is making significant strides in improving gender equality. The OECD Social Institutions and Gender Index (SIGI) (Box 3.1) ranked South Africa 45th of 120 countries in 2019. It was thus the top performer in the African continent, placing it in the “low” category of gender-based discrimination (Figure 3.1).

Figure 3.1. SIGI in South Africa 2019



#### Box 3.1. OECD Social Institutions and Gender Index

The Social Institutions and Gender Index (SIGI) is a tool for policy makers, development partners and researchers. It allows better understanding of the progress and challenges of each country in moving towards achieving gender equality and the commitments of Agenda 2030.

The SIGI measures discrimination against women in social institutions across 180 countries. By considering laws, social norms and practices, the SIGI captures the underlying drivers of gender inequality to provide the data necessary for transformative policy change over four dimensions:



**Discrimination in the family** captures social institutions that limit women’s decision-making power and undervalues their status in the household and the family, in particular around the following variables: child marriage, household responsibilities, inheritance and divorce.



**Restricted physical integrity** captures social institutions that increase women’s and girls’ vulnerability to a range of violence and limit women’s control over their bodies and reproductive autonomy.



**Restricted access to productive and financial resources** captures women’s restricted access to and control over critical productive and economic resources and assets, such as land and non-land assets, formal financial services and workplace rights.



**Restricted civil liberties** captures discriminatory laws and practices restricting women’s access, participation and voice in the public and social spheres, through the following variables: citizenship rights, freedom of movement, political voice and access to justice.

For more information, see [www.genderindex.org](http://www.genderindex.org).

Source: SIGI.

The country's legal framework aims to address structural obstacles to gender equality. The right of women to the same opportunities as men is firmly protected in progressive legislation, notably the Constitution, as well as in social policies more broadly (OECD, 2019<sub>[15]</sub>).

Despite legislative provisions, barriers to full gender equality persist in South Africa. Women's unequal share of unpaid care work is salient: women in any domestic partnership are more likely, relative to men, to undertake household maintenance and cleaning (STATS SA, 2013<sub>[16]</sub>). Moreover, South Africa has high rates of gender-based violence, including domestic violence prevalence. One-fifth of women had experienced physical violence by a partner in a lifetime as of 2016 (STATS SA, 2016<sub>[17]</sub>). South Africa has also higher female unemployment, and a lack of representation of women in top management positions (Commission for Gender Equality, 2015<sub>[18]</sub>).

The family sphere is often a major locus of discrimination: social norms and practices relating to household responsibilities, child marriage, divorce and inheritance can have long-lasting impacts on women and girls, and on society as a whole. In South Africa, men spend 12.2 hours per week on unpaid care work, compared with 30.5 hours per week for women. When time devoted to paid work is added to this total, women spend more hours per week working than men (48.9 hours compared to 44.6 hours), a pattern that holds for all age groups (Oosthuizen, 2018<sub>[19]</sub>). The uneven sharing of responsibilities reduces women's ability to pursue paid work or an education relative to men, and in turn reduces future earning potential. This leaves women with less time for leisure, self-care and/or civic or political participation.

In terms of the physical integrity of women, violence against women is high in South Africa (Hsiao et al., 2018<sub>[20]</sub>) despite strong laws. Estimates suggest almost a quarter of South African women who have ever been partnered have experienced physical violence committed by a partner in their lifetime (STATS SA, 2018<sub>[13]</sub>).

In addition, women as a group are likely to work in the informal, part-time or domestic work sectors, where work pays less and has minimal benefits. As the country has high structural unemployment, women's access to the labour market is limited, despite the potential in some sectors such as tourism (OECD, 2020, p. 128<sub>[10]</sub>).

## 3.2. Domestic philanthropic funding towards gender equality in South Africa

### **Domestic philanthropic funding towards gender equality in South Africa represents around 27% of total funding, driven mainly by a strong focus on scholarship programmes**

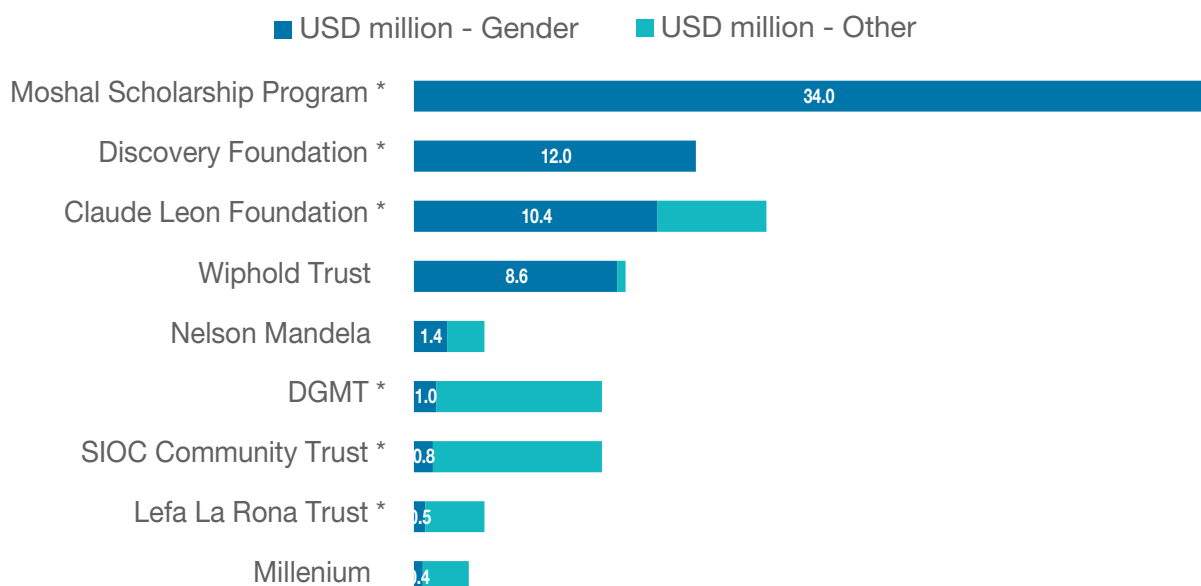
Domestic philanthropy in South Africa provided an estimated USD 113 million to programmes supporting various aspects of gender equality in the country, corresponding to 25% of total flows between 2013 and 2018. Most surveyed foundations (26 of 31) implemented programmes related to gender equality between 2013 and 2018, of which the Moshal Scholarship Program, Claude Leon Foundation and Discovery Foundation represent half of all gender-related funding (Figure 3.2).

This amount includes all programmes that tackle at least one of four aspects of gender inequality defined by the SIGI (see Annex D): discrimination in the family; restricted physical integrity; restricted access to productive and financial resources; and restricted civil liberties.<sup>12</sup> The amount comprises programmes that target gender equality as their main objective, as well as sectoral programmes that include gender equality as a deliberate objective but not as the principal reason for undertaking the programme, i.e. programmes that have a gender component or mainstream gender equality.

The proportion of funding for gender equality (25%), as classified using the SIGI, is relatively high in South Africa compared to domestic philanthropic flows in the other countries in this research (e.g. 8% of total flows in Colombia). However, some caution is warranted in interpreting the data as more than half of this funding (55%) was implemented through scholarship programmes. Scholarships are systematically included as gender-related since they can be a crucial lever to tackle persisting gender inequalities in the labour market and higher education. However, both women and men received scholarships and it was not possible to isolate the amount spent only for women.

<sup>12</sup> As a single project can tackle multiple drivers of gender inequality, these estimates show only how many projects aimed to tackle each of the four dimensions captured by the SIGI, as indicated in Annex D.

Figure 3.2. Top 10 philanthropic funders on gender equality in South Africa, 2013-18



Note: \* Top 15 donors.

### Increasing women's access to financial and productive resources is the main focus of South African philanthropy for gender equality

Gender-related funding from foundations in South Africa is mainly focused on avenues to improve women's access to financial and productive resources. The amount of USD 87 million in funding, representing 77% of total resources towards gender equality, was allocated to improve access to higher education through scholarships and training programmes. Consequently, this represents an important means to increase women's participation in the labour market and their ability to advance economically.

Education is essential for girls to overcome unemployment and poverty later in life. Evidence from South Africa shows that women with higher levels of education are substantially less likely to be unemployed (Stats SA, 2017<sup>[21]</sup>). Women's enrolment in secondary and tertiary education is high in South Africa by regional standards. In 2018, for example, the country had a gross enrolment rate of 104% for women in secondary education and of 28.3% for women in tertiary education (UIS, 2019<sup>[22]</sup>). It is critical to ensure these gains persist. Evidence suggests certain types of investments in girls' and young women's education and training can be a powerful driver of women's economic empowerment (see Box 3.2).

#### Box 3.2. Education and training as drivers of women's economic empowerment

**Education is a critical lever for women's economic empowerment.** In South Africa, individuals with low levels of education are more likely to be unemployed. On average, about one in two young women without a high-school degree was unemployed in 2017, compared to approximately one in ten women with a high-school degree (Stats SA, 2017<sup>[21]</sup>). Low-educated young Black women were particularly disadvantaged, facing higher rates of unemployment than similarly low-educated non-Black women (Stats SA, 2017<sup>[21]</sup>). Moreover, gender disparities between male and female employment rates were lower among individuals with higher levels of education (Stats SA, 2017<sup>[21]</sup>).

An overview of the evidence from rigorous impact evaluations reveals the following:

##### 1. Removing financial barriers to girls' and young women's education can be a stepping stone for their economic success later in life.

Merit-based scholarships can increase girls' learning outcomes and their time spent in educational institutions (Damon et al., 2016<sup>[23]</sup>); (Kremer, Miguel and Thornton, 2009<sup>[24]</sup>). Scholarships generally provide money to students and/or their families to cover tuition fees and living expenses (Sperling and Winthrop, 2015<sup>[25]</sup>); (Unterhalter et al., 2014<sup>[26]</sup>). Eligibility often depends on school performance, measured through test scores (Damon et al., 2016<sup>[23]</sup>).

### Box 3.2. Education and training as drivers of women's economic empowerment (cont.)

One additional year of schooling increases earnings by almost 10% on average, with often higher returns for girls than boys (Psacharopoulos and Patrinos, 2018<sub>[27]</sub>). Scholarships that relieve financial constraints and stir students' learning efforts can thus be an effective tool to improve women's economic outcomes in the long run. More research is needed to identify how to best design scholarship programmes. Key issues include the optimal timing (e.g. end vs. beginning of the school year), frequency (e.g. one lump-sum vs. multiple instalments) and amount of payments (Banerjee et al., 2013<sub>[28]</sub>).

Cash transfers can also increase investment in girls' education and improve women's long-term economic outcomes. Most effective schemes target young women and are tied to school attendance (Buvinic and O'Donnell, 2016<sub>[29]</sub>); (Baird et al., 2014<sub>[30]</sub>). Evidence shows that conditional cash transfers improve women's educational outcomes, delay marriage and pregnancy, and lead to better job opportunities and higher earnings in the future (Buvinic and O'Donnell, 2016<sub>[29]</sub>); (Malhotra and Elnakib, 2021<sub>[31]</sub>).

#### 2. Providing young women with skills that are useful in the labour market, as well as soft- and life-skills, can ease their transition from education to employment

Vocational training programmes can have a positive impact on women's employment. This is especially the case when these programmes target disadvantaged youth and involve potential employers to inform curriculum design and offer internship opportunities (Graham et al., 2019<sub>[32]</sub>); (Kluge et al., 2017<sub>[33]</sub>); (Attanasio, Kugler and Meghir, 2011<sub>[34]</sub>); (Attanasio et al., 2017<sub>[35]</sub>); (Chakravarty et al., 2019<sub>[36]</sub>); (Das, 2021<sub>[37]</sub>). Effective programmes also tend to include soft-skill trainings that enhance women's self-esteem and improve negotiation skills. These can help participants convince family members to allow them to engage in paid work (Acevedo et al., 2020<sub>[38]</sub>); (Chang et al., 2020<sub>[39]</sub>); (Taylor and Pereznieta, 2014<sub>[40]</sub>). Furthermore, vocational training in combination with life skills – such as information on sexual health, family planning and marriage – can increase women's economic outcomes since they help prevent early pregnancy and marriage, and reduce incidents of sexual abuse (Bandiera et al., 2020<sub>[41]</sub>).

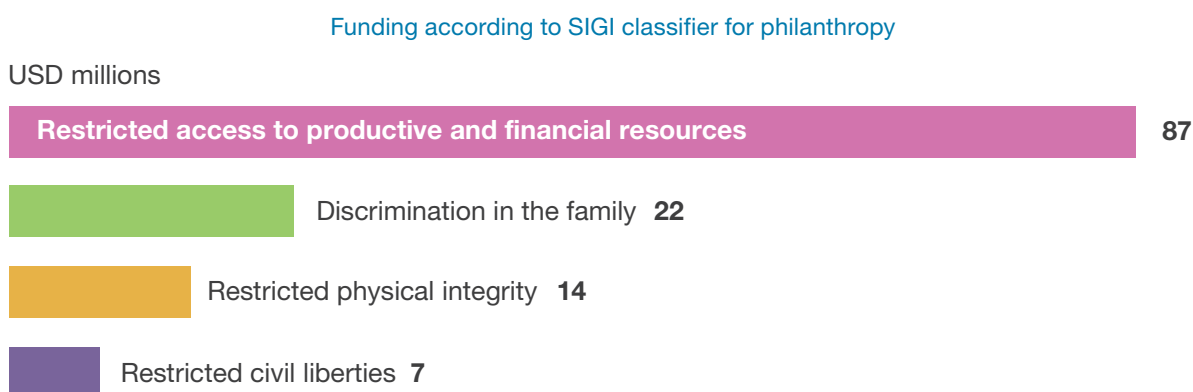
In addition, trainings that aim to improve women's business management skills, including accounting and financial planning, can advance business creation, performance and survival. High quality trainings tend to have a positive impact on women's business knowledge, sales and revenues (Buvinic and O'Donnell, 2016<sub>[29]</sub>); (Calderon, Cunha and De Giorgi, 2013<sub>[42]</sub>); (Valdivia, 2015<sub>[43]</sub>). Similar to vocational trainings, business trainings seem most effective when they incorporate a life skills component to improve individual agency and self-confidence (Alibhai et al., 2019<sub>[44]</sub>); (Chinen et al., 2017<sub>[45]</sub>).

**3. Training programmes are particularly effective in improving women's economic outcomes if their design caters to women's day-to-day constraints** such as time or travel restrictions (Chang et al., 2020<sub>[39]</sub>); (Buvinic and Furst-Nichols, 2014<sub>[46]</sub>). Given women's greater burden of unpaid work and often restricted freedom of movement, local training sessions that reduce commuting time or encouraging women to participate with a friend may increase take-up rates and regular attendance (Buvinic and O'Donnell, 2016<sub>[29]</sub>); (Chinen et al., 2017<sub>[45]</sub>); (Field et al., 2016<sub>[47]</sub>). Furthermore, training programmes may provide access to family planning to prevent unwanted early pregnancies, and/or provide access to affordable childcare services so women can find the time to attend trainings (Chang et al., 2020<sub>[39]</sub>); (Bandiera et al., 2020<sub>[41]</sub>).

Beyond a lack of skills, women in South Africa face further barriers to advance economically. For instance, women entrepreneurs in South Africa are more likely to be subsistence entrepreneurs without hired employees when they own their own business compared to their male counterparts (Stats SA, 2017<sub>[21]</sub>); women spend on average more than twice as many hours on unpaid care and domestic work than men (World Bank, 2010<sub>[48]</sub>); (OECD, 2019<sub>[49]</sub>) and women's labour market participation drops substantially when they have minor children (Stats SA, 2017<sub>[21]</sub>). Various interventions could overcome these barriers. More information on effective women's economic empowerment programmes can be found in Annex F.

Programmes tackling discrimination in the family represented USD 22 million mainly in the area of providing ECD services. South Africa also targeted USD 14 million to reduce violence against women and USD 7 million to improve women's civil liberties (Figure 3.3).

Figure 3.3. Domestic philanthropic financing towards gender equality by SIGI dimension, 2013-18



Note: \*Given that funding can address more than one dimension, each programme classified in multiple dimensions was included in the total of each dimension.

Domestic philanthropic funding towards gender equality is mainly channelled through the education sector (scholarships, training and early childhood education). The next most important channel is health and reproductive health (provision of health care services, prevention and treatment of HIV/AIDS, sexual education). Support to governance and civil society (human and women's rights organisations, access to justice) follows. Together, they encompass 82% of all funding identified as contributing to any gender equality dimension (Table 3.1).

Table 3.1. Sector allocation for philanthropy towards gender equality, 2013-18

Sector	USD millions
Education	65
Health and reproductive health	16
Government and civil society	14
Multisector	10
Other social infrastructure	5
Total classified SIGI 2013-18	112

Source: OECD.

In addition, the geographical distribution of this funding is different from the general distribution of domestic philanthropic funding. Most funding related to any SIGI gender dimension is concentrated in Eastern Cape with USD 46 million (40%), Western Cape with USD 13 million (11%) and Gauteng with USD 10 million (9%).

Finally, as mentioned above, gender-related funding is mainly disbursed through scholarships (32%) and foundations' own projects. Local non-governmental organisations disburse 15% of gender-related funding, including 8% disbursed by women's rights organisations (Table 3.2).

Table 3.2. Modality of donation for philanthropy towards gender equality, 2013-18

Modality	USD millions	Percentage
Not specified	37	33%
Scholarships	37	32%
Projects implemented by foundations	22	20%
Contributions to NGOs, other organisations	17	15%
<b>Total classified SIGI 2013-18</b>	<b>113</b>	<b>100</b>

Note: NGOs = non-governmental organisations.

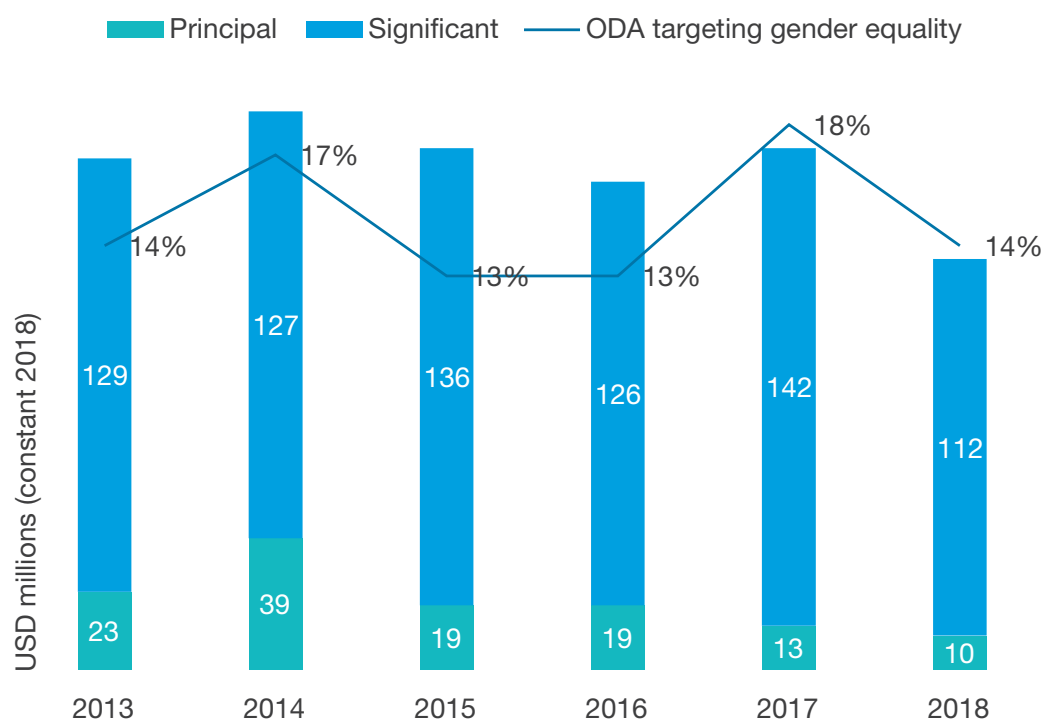
### 3.3. ODA and international philanthropic funding for gender equality in South Africa

#### Decreasing ODA towards South Africa in recent years has not reduced funding towards gender equality

Although ODA towards South Africa has steadily decreased over time, resources with the principal or significant objective of reducing gender inequalities remain relatively constant.<sup>13</sup> ODA with gender equality as a significant objective reached a peak in 2014 with USD 166 million. It averaged USD 149 million between 2013-18, reaching its lowest point in 2018 at USD 112 million (Figure 3.4).

Figure 3.4. ODA towards gender equality to South Africa 2013-18

Gross disbursements



Note: "Principal" means that gender equality is the main objective of the project/programme and is fundamental in its design and expected results. The project/programme would not have been undertaken without this objective.

"Significant" means that gender equality is an important and deliberate objective but not the principal reason for undertaking the project/programme.

"Screened" represents resources verified by donors.

Source: OECD DAC CRS.

13. The DAC gender equality policy marker is a qualitative statistical tool to record aid activities that target gender equality as a policy objective. It is used by DAC members as part of the annual reporting of their aid activities to the DAC. The gender equality policy marker is based on a three-point scoring system:

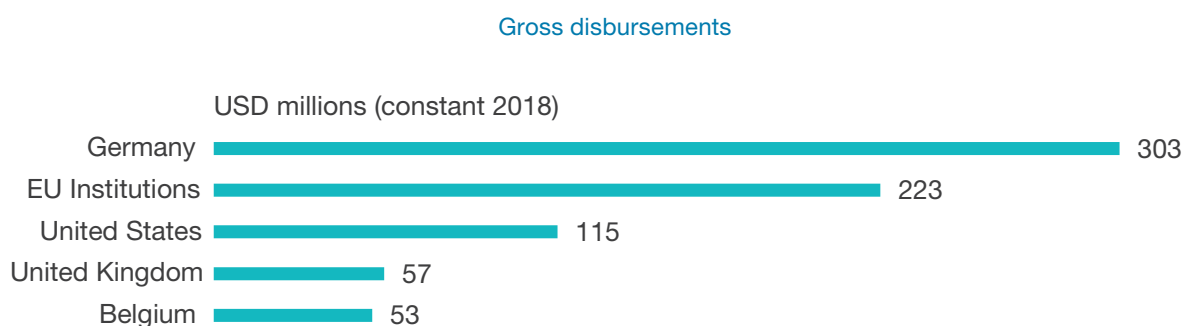
- "Principal" means that gender equality is the main objective of the project/programme and fundamental in its design and expected results. The project/programme would not have been undertaken without this objective.
- "Significant" means that gender equality is an important and deliberate objective but not the principal reason for undertaking the project/programme.
- "Not targeted" means that the project/programme has been screened against the gender marker but had not been found to target gender equality.

For more information, see [www.oecd.org/dac/gender-development/dac-gender-equality-marker.htm](http://www.oecd.org/dac/gender-development/dac-gender-equality-marker.htm).

### Germany and EU institutions have been the largest ODA donors for gender equality

South Africa's main ODA donors in the area of gender equality have provided the most funding to the country. Germany and EU institutions together contributed between 59% of all ODA for gender equality to South Africa in 2013-18 (Figure 3.5). Other donors such as the United States, the United Kingdom and Belgium provided additional funding over this period.

Figure 3.5. Top five bilateral ODA donors to South Africa based on gender equality funding 2013-18



Note: Funding classified as principal or significant in DAC gender equality policy marker.

Source: OECD DAC CRS.

### ODA funding towards gender equality has concentrated in the areas of government, education and control of STDs, and coincides with philanthropic financing in supporting SMEs

Between 2013 and 2018, sector-allocable ODA towards South Africa that aimed to reduce gender inequalities totalled USD 982 million. The largest proportion was allocated towards government, followed by control of sexually transmitted diseases (STDs) and multisector aid. In addition, support to the development of small and medium-sized enterprises stands as the largest funded economic sector (Table 3.3) that overlaps with philanthropic financing.

Table 3.3. Top five ODA sectors and subsectors funded for gender equality funding towards South Africa, 2013-18

Sector/Subsector	Total USD millions constant
<b>Government and civil society</b>	<b>241</b>
Democratic participation and civil society	69
<b>Education</b>	<b>156</b>
Education, unspecified level	78
<b>Population policies/programmes &amp; reproductive health</b>	<b>145</b>
STD control including HIV/AIDS	141
<b>Multisector</b>	<b>133</b>
<b>Industry, mining, construction</b>	<b>82</b>
Development of small and medium-sized enterprises	68
<b>Other sectors</b>	<b>224</b>
<b>Total sector allocable</b>	<b>982</b>

Note: Funding classified as principal or significant in DAC gender equality policy marker.

Source: OECD DAC CRS.

### International philanthropy supports gender equality mainly through health programmes and support to women's rights organisations

For 2018, most funding towards gender equality provided by the 31 donors that regularly report to the OECD amounted to USD 14 million. These donors were led by the Ford Foundation (USD 6 million), Bill & Melinda Gates Foundation (USD 2 million) and the Wellcome Trust (USD 2 million). Most of this funding is aimed at strengthening government and civil society and reproductive health, in particular STD control (including HIV/AIDS).

**Table 3.4. Top international donors funding gender equality in South Africa, 2018**

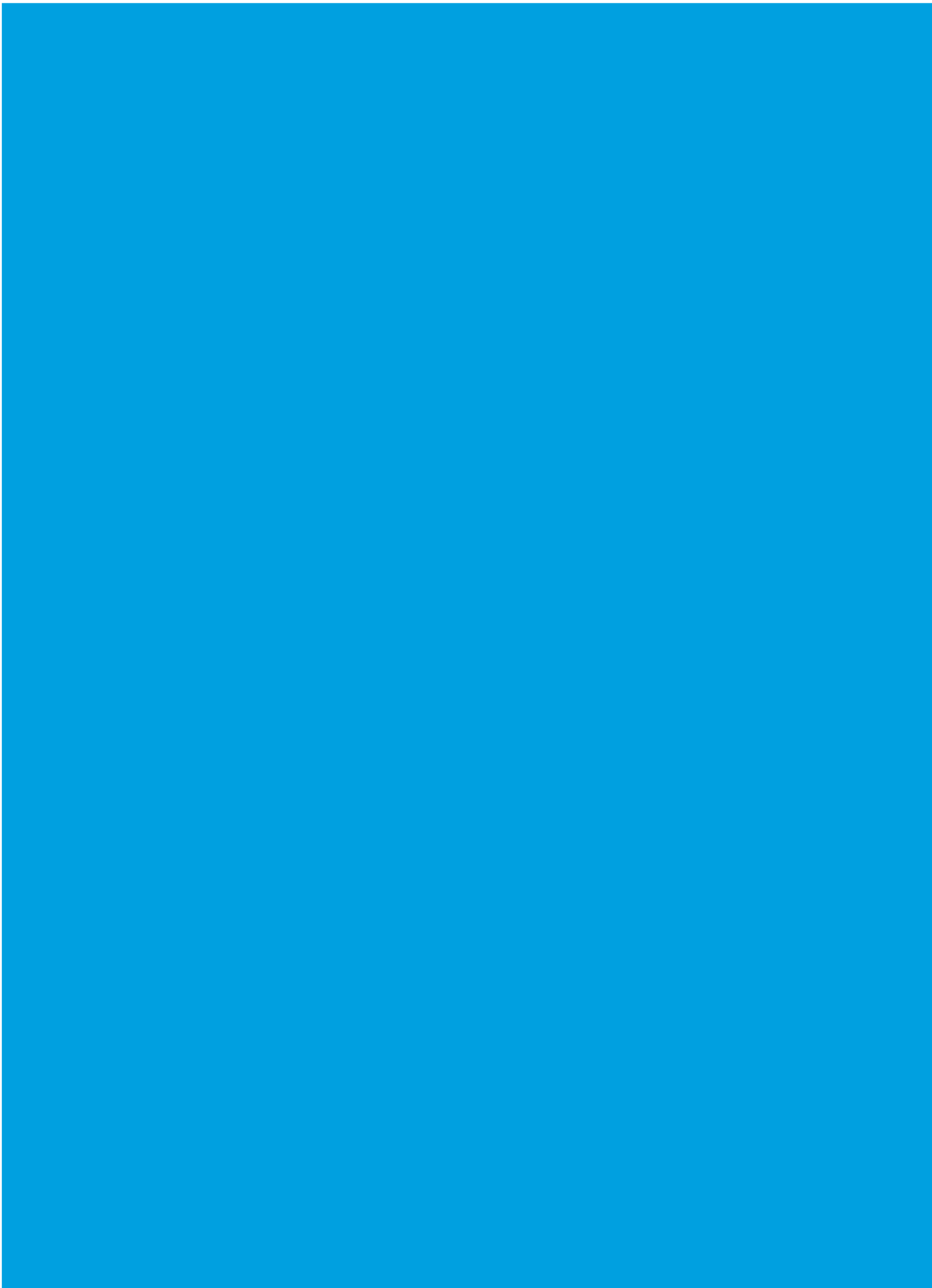
<b>International donor / Sector</b>	<b>USD millions, 2018</b>
<b>Ford Foundation</b>	<b>6</b>
Government and civil society	6
<b>Bill &amp; Melinda Gates Foundation</b>	<b>2</b>
Health and reproductive health	2
<b>Wellcome Trust</b>	<b>2</b>
Health and reproductive health	2
<b>Other *</b>	<b>4</b>
<b>Total</b>	<b>14</b>

\* Includes Swedish Postcode Lottery, Charity Projects Ltd (Comic Relief), Oak Foundation, Arcus Foundation, MasterCard Foundation, William & Flora Hewlett Foundation and Conrad N. Hilton Foundation.

Note: Funding classified as principal or significant in DAC gender equality policy marker.

Source: OECD DAC CRS.





# 4\_ Key lessons and way forward



**OECD CENTRE ON PHILANTHROPY**  
Data and analysis for development

**1. Information sharing and transparency are sub-optimal in the South African philanthropic sector, but a critical mass of collaborative organisations is beginning to emerge.** Information on the sector is not readily available, and financial statements from organisations often do not reflect specific donations or projects. In addition, little is known about the extent of collaboration within the sector, which has been increasing in other emerging economies, such as India or Colombia.

- **Minimum reporting requirements can help improve transparency in the philanthropic sector.** Disclosure of minimum information for tax-deduction eligible organisations should be considered. This can help organisations share information both with authorities and also among themselves, as well as improve public trust on domestic philanthropic organisations (OECD, 2020<sub>[50]</sub>). Section 18 (1) (a) of the NPO Act (Act No. 71 of 1997) indicates that all NPOs must regularly share information with the Ministry of Social Development, but this information is not systematically made public. In other countries like Colombia, non-profits have a self-reporting obligation. This requires them to publish annual reports on their websites, detailing activities, main projects and financial information. In addition, foundations and trusts that receive co-financing from public agencies should clearly distinguish private and public resources. More generally, they should move towards openly and regularly publishing project-by-project information.

**2. Domestic and international philanthropy have strong alignment of priorities in education, support to human rights and democracy.** Education is the first most-funded sector for domestic foundations and second most-funded for international foundations. Support to human rights – including women’s rights organisations – is the third most-supported sector for both domestic and international foundations. Ad-hoc and bilateral relations between individual foundations, informal funders’ groups (e.g. around ECD, scholarships or social justice) have led to some co-operation and a few co-funding partnerships.

- **Partnerships between domestic and international philanthropic organisations working in South Africa, especially in education or human rights, could be scaled up through existing national and regional platforms.** First, domestic and international foundations could increase their interactions at various levels. National platforms, such as IPASA, could expand the exposure to international foundations by providing an opportunity for numerous international foundations investing in South Africa to be part of the platform (currently only foundations with offices in South Africa can become members). Second, South African foundations could consider more systematic exposure and dialogue with international funders working in South Africa by joining some of the various pan-African networks (APN, APF, AVPA). Third, existing networks and loose groups of co-operating funders could consider strengthening their role as partnership brokers. For example, they could go beyond information sharing and peer learning, especially in thematic areas with a high level of interest, such as education or human rights.

**3. Most domestic philanthropic funding towards gender equality is channelled through the education sector (mainly scholarships for higher education but also training and ECD), with the aim of improving women’s access to financial and productive resources.** Moreover, a few foundations in South Africa provide support to other areas like access to justice or addressing violence against women, often as part of their human rights and social justice programmes.

- **Investing in women’s access to resources from an early age is a critical starting point to improve women’s economic outcomes in the long term.** In South Africa, girls’ have higher enrolment and attainment rates than boys, from primary to tertiary education. However, it is critical to ensure these gains persist. Philanthropic interventions (e.g. cash transfers, stipends, scholarship schemes) are an effective means to remove financial barriers to schooling, and improve girls’ and young women’s educational attainment. One additional year of schooling increases earnings by almost 10% on average, with often higher returns for girls than boys. Thus, programmes that lift financial barriers for families so girls can access and remain in school are a starting point to improve their economic outcomes in the longer run.
- **Beyond investments in scholarships and higher education, foundations could consider vocational and business management trainings to improve marketable skills and employment opportunities.** While philanthropic flows for basic life skills for youth and adults attracted 69% of total domestic education funding between 2013-18, vocational training received only 2% of total domestic education giving. Evidence shows that vocational and business management trainings can improve

women's marketable skills and business knowledge. Beyond insight into business practices and a specific job sector, these trainings can include soft- and life-skills modules to help improve women's self-confidence and social skills. Acquiring these skills is relevant for women's economic outcomes as they can improve their ability to deal with social challenges, negotiate engagement in paid work with family members and improve business performance through greater self-confidence. Large proportions of young women are out of schooling, training or employment in South Africa. Therefore, investments in training oriented to the labour market, combined with internships or recruitment assistance, could help improve their economic opportunities.

- **Beyond interventions that seek to improve women's level of skills and education, programmes that grant women access to financial assets can improve their economic outcomes.** In South Africa, women continue to earn less, to work fewer paid hours, to be more likely to be unemployed and to be less likely to reach management positions in the public and private sector, compared to their male peers (ILO, 2019<sup>[51]</sup>). Various philanthropic interventions have the potential to improve women's economic opportunities. More information on effective economic empowerment programmes can be found in Annex F.
- **More research is needed to explore what works best and why to unleash women's economic empowerment by changing discriminatory social norms.** Social beliefs about what is appropriate for a woman and man to do undermine women's access to productive and financial resources. In South Africa, social expectations of men's financial dominance in the household, and binary gender roles that confine women to domestic responsibilities, remain prevalent and prevent women from advancing economically. Group-based interventions that stir critical reflection, communications campaigns using social or mass media and edutainment (a combination of education and entertainment) show promising results in changing social norms. Yet foundations need to invest more in exploring the impact of such programmes on women's economic empowerment and how they can be combined with traditional approaches such as trainings or stipends.
- **Further research is needed on how to overcome gender-based and race-based prejudices among financial service providers and employers.** Financial service providers have the capacity to improve women's economic situation by providing access to critical resources. If these providers discriminate on the basis of gender and race, (Black) women will remain economically disadvantaged. Exploring approaches to reduce gender and race-based stereotypes may help level the playing field to sustainably improve all women's economic opportunities.
- **Domestic philanthropic organisations supporting social justice programmes with a gender equality angle should continue engaging with other donors involved in that space.** A number of domestic and international philanthropic organisations share women's human rights as a priority. A few domestic and international foundations working in this space in South Africa, already interact through a loose group of funders initiated by the Ford Foundation in 2017. This group includes official bilateral and multilateral donors as well. Foundations, both domestic and international, may perceive advancing women's human rights as complex and sensitive. Indeed, women's rights programmes and projects often aim to challenge or disrupt political and social norms related to gender equality. This makes collaboration between different funders (domestic and international foundations but also official bilateral and multilateral donors) even more essential. Such collaboration creates a trusted space for deepening knowledge about gaps, overlaps and effective approaches; devising joint advocacy; and leveraging co-funding for greater collective impact on long-standing and emerging women's human rights issues.

## ANNEX A

### Definitions

#### Philanthropy for development – OECD DAC Definition

“*Private philanthropic flows for development*” refers to transactions from the private sector having the promotion of the economic development and welfare of developing countries as their main objective and which originate from foundations’ own sources, notably endowment, donations from companies and individuals (including high net worth individuals and crowdfunding) and legacies, as well as income from royalties, investments (including government securities), dividends, lotteries and the like. Philanthropic activities funded by other philanthropic foundations or governments are out of scope. Furthermore, charitable giving from religious institutions is only included if aimed at supporting development and improving welfare (Benn, Sangaré and Hos, 2018<sup>[68]</sup>).

#### Official Development Assistance (ODA)

The DAC defines ODA as those flows to countries and territories on the DAC List of ODA recipients ([www.oecd.org/development/financing-sustainable-development/development-finance-standards/dac-list.htm](http://www.oecd.org/development/financing-sustainable-development/development-finance-standards/dac-list.htm)) and to multilateral institutions (<http://www.oecd.org/development/financing-sustainable-development/development-finance-standards/officialdevelopmentassistancedefinitionandcoverage.htm>) which are:

- provided by official agencies, including state and local governments, or by their executive agencies; and
- each transaction of which:
- is administered with the promotion of the economic development and welfare of developing countries as its main objective; and
- is concessional in character. In DAC statistics, this implies a grant element of at least
- 45% in the case of bilateral loans to the official sector of LDCs and other LICs (calculated at a rate of discount of 9%).
- 15% in the case of bilateral loans to the official sector of LMICs (calculated at a rate of discount of 7%).
- 10% in the case of bilateral loans to the official sector of UMICs (calculated at a rate of discount of 6%).
- 10% in the case of loans to multilateral institutions (calculated at a rate of discount of 5% for global institutions and multilateral development banks, and 6% for other organisations, including sub-regional organisations).

Loans whose terms are not consistent with the IMF Debt Limits Policy and/or the World Bank’s Non-Concessional Borrowing Policy are not reportable as ODA.

#### ODA grant equivalent measure

- The ODA grant equivalent measure is calculated for ODA flows, as defined above. For loans to the official sector which pass the tests for ODA scoring [conditions i) and ii) above], the grant equivalent recorded as ODA is obtained by multiplying the annual disbursements on the loan by the loan’s grant element as calculated at the time of the commitment.

For more information, see [www.oecd.org/dac/financing-sustainable-development/development-finance-standards/officialdevelopmentassistancedefinitionandcoverage.htm](http://www.oecd.org/dac/financing-sustainable-development/development-finance-standards/officialdevelopmentassistancedefinitionandcoverage.htm).

## ANNEX B

### Literature review on women's economic empowerment

#### Effective sample of respondents

No	Organisation name	Organisation survey	Activities survey	Financial information provided for period
1	Alchemy: Lefa La Rona Trust	Yes	Yes	2013-18
2	Ball Family Foundation	Yes	Yes	2018
3	Claude Leon Foundation	Yes	Yes	2013-18
4	Cyril Ramaphosa Foundation Trust	Yes	Yes	2013-18
5	DGMT	Yes	Yes	2013-18
6	Discovery Foundation Trust	Yes	Yes	2013-18
7	Distell Development Trust	Yes	Yes	2015-18
8	Grindrod Family Centenary Trust	Yes	Yes	2014-18
9	HCI Foundation	Yes	Yes	2013-18
10	Imperial and Motus Community Trust	Yes	Yes	2013-18
11	Italtile & Ceramic Foundation	Yes	Yes	2016-18
12	Kagiso Trust	Yes	Yes	2013-18
13	Millennium Trust	Yes	Yes	2013-18
14	Murray & Roberts: Letsema Khanyisa Trust and Letsema Sizwe Community Trust	Yes	Yes	2013-18
15	Moshal Scholarship Program	Yes	Yes	2013-18
16	Naspers Labs	Yes	Yes	2017-18
17	Nedbank Eyethu Community Trust	Yes	Yes	2013-18
18	Nelson Mandela Children's Fund	Yes	Yes	2013-18
19	Otto Foundation	Yes	Yes	2017-18
20	Scatec Solar, SED and ED Trusts	Yes	Yes	2013-18
21	SIOC Community Development Trust	Yes	Yes	2013-18
22	South African Breweries Foundation	Yes	Yes	2013-18
23	Standard Bank Tutuwa Community Foundation	Yes	Yes	2016-18
24	The Harry & Doris Crossley Foundations	Yes	Yes	2013-18
25	The Lewis Foundation	Yes	Yes	2013-18
26	The RAITH Foundation	Yes	Yes	2013-18
27	The Sanlam Foundation Trust	Yes	Yes	2013-18
28	The Saville Foundation	Yes	Yes	2018
29	The Tiger Brands Foundation	Yes	Yes	2013-2018
30	WIPHOLD NGO Trust	Yes	Yes	2013-2018
31	Zenex Foundation	Yes	Yes	2013-2018

## ANNEX C

### Geographical estimates

The activities, project and grants sampled were classified in one of three categories:

**Type 1: Provinces, known distribution.** All activities for which the foundation knew the location of the disbursement of the resources. e.g. Project A, Gauteng, R100.

**Type 2: Provinces, unknown distribution.** All activities for which the foundation was uncertain about exactly where the resources were distributed but for which the foundation knew the regions of operation. e.g. Scholarship A, in Gauteng, Eastern Cape and Limpopo, for R100 total.

**Type 3: Non-allocable geographically.** Activities that do not have a geographical dimension, such as research by universities, and for which the organisation does not know the location.

**Aggregation methodology:** The geographical estimates for each province were derived by adding Type 1 and prorated estimates for Type 2, which were estimated assuming a uniform distribution: i.e. the total funding allocated among all provinces indicated by the foundation was divided in equal proportions, such that if an activity were carried out in five provinces for R100, each region would receive R20.

Example: An organisation has projects  $A$  and  $B$ . Project  $A$  is Type 1, located in a single region  $R_1$ , while Project  $B$  is Type 2, as the organisation knows that it operates in regions  $R_1$ ,  $R_2$  and  $R_3$ . The organisation allocates  $X_A$  and  $X_B$  to projects  $A$  and  $B$ , respectively. The geographical estimates for all regions are:

Region	Project	Project	Estimates per region
$R_1$	$X_A$	$\frac{X_B}{3}$	$X_A + \frac{X_B}{3}$
$R_2$	0	$\frac{X_B}{3}$	$\frac{X_B}{3}$
$R_3$	0	$\frac{X_B}{3}$	$\frac{X_B}{3}$

## ANNEX D

### The Social Institutions and Gender Index (SIGI) classifier for philanthropic activities

The OECD Development Centre's Social Institutions and Gender Index (SIGI) measures discrimination against women in social institutions across 180 countries. By considering laws, social norms and practices, the SIGI captures the underlying drivers of gender inequality with the aim to provide the data necessary for transformative policy change. See [www.genderindex.org](http://www.genderindex.org).

The SIGI has four dimensions that were used to classify each philanthropic initiative or project. Project names and descriptions were screened using a keyword search, based on terms selected for each of the SIGI dimensions, and then classified according to the criteria below. Every project or grant can, therefore, be attached to at most the four SIGI dimensions, leading to a score of 0 (none) to 4 (all dimensions).

SIGI dimension	Keyword search	Criteria for classification
Discrimination in the family	woman, women, girl, gender, feminine, adolescent, equality, equity, discrimination, abilities, home, family, economic, economy, childhood, infant, son, daughter, care, labour, motherhood, parenthood, marriage, domestic, work, pay, remuneration, elder, divorce, inheritance, widow, pregnancy, mother	Projects that 1) provide goods or services that free up time within the household; 2) provide educational or care services for both children or the elderly; 3) provide awareness about child marriages; 4) provide legal advice on matters related to the family.
Restricted physical integrity	woman, women, girl, sexual, gender, feminine, LGBT, adolescent, pregnancy, reproduction, reproductive, health, violence, victim, abuse, harassment, rights, motherhood, equality, equity, conflict, capacities, home, psychosocial, rape, contraception, abortion, planning, family, ablation	Projects that 1) provide services or information on reproductive health; 2) care for victims and survivors of domestic or other violence.
Restricted access to productive assets and financial resources	woman, women, girl, gender, feminine, adolescent, pregnancy, violence, femicide, equality, equity, conflict, capacities, home, entrepreneurship, entrepreneur, company, micro-enterprise, credit, savings, debt, empowerment, loan, economic, vocational, business, labour, training, access, financial, finance, bond, apprenticeship, university, course, peasant, productive, skill, motherhood, fatherhood, land, property, house, asset	Projects that 1) provide capital to women in the form of loans or other instruments; 2) training towards entrepreneurship; 3) university or advanced studies.
Restricted civil liberties	woman, women, girl, feminine, LGBT, gender, representation, politics, law, peace, conflict, victim, justice, transport, public, harassment, security, governance, leadership, judge, trial, police, legal, lawyer, identity, passport, ethnicity, indigenous, afro	Projects that 1) seek to defend or restore women's rights; 2) increase women's political participation or representation; 3) promote access to justice for women; 4) seek to improve the safety of women in public transport or in public spaces.



## ANNEX E

The evidence review comprises counterfactual evaluations of interventions in developing countries with the goal of improving women's economic empowerment. Studies assess direct outcomes of economic empowerment (e.g. women's labour force participation, entrepreneurship creation, income and economic self-reliance), as well as intermediary outcomes that can lead to economic empowerment (e.g. change in behaviours, attitudes and norms that limit women's economic opportunities).

It draws from recent studies from 2010 onwards using strong identification strategies. These are predominantly randomised controlled trials but also quasi-experimental methods that include regression discontinuity design, difference in differences or instrumental variables. The primary target population of the evaluated interventions are women and girls, particularly those from low socio-economic background.

Studies considered were published in academic journals – primarily the *Journal of Economic Development*, the *American Economic Journal* and the *American Economic Review*. Furthermore, reviews and working papers were considered from renowned research institutes and organisations including the National Bureau of Economic Research, the Abdul Latif Jameel Poverty Action Lab, Campbell Collaboration, the International Initiative for Impact Evaluation, the World Bank and the Overseas Development Institute.

The inclusion criteria were fourfold: the study (1) uses an experimental or quasi-experimental evaluation method; (2) focuses on the improvement of women's access to productive and financial resources in developing countries; (3) targets women and girls or men and boys with the objective to improve women's economic empowerment; and (4) was published in the year 2010 or onwards.

## ANNEX F

### Evidence-based approaches to improving women's access to resources

Although progress has been made towards women's economic empowerment in South Africa, women continue to earn less, to work fewer paid hours, to be more likely to be unemployed and to be less likely to reach management positions in the public and private sector, compared to their male peers (ILO, 2019<sub>[51]</sub>).

To shed light on effective approaches that can help advance women's economic opportunities, the following paragraphs draw on impact evaluations from different developing countries. They were produced by academics in close collaboration with implementing partners in the field. Findings from these studies, combined with a deep understanding of South Africa's local context, institutions and social norms, can provide useful insights into how to design and improve programmes geared to foster women's economic empowerment.

Beyond interventions that seek to improve women's level of skills and education, programmes that grant women **access to financial assets** can improve women's economic outcomes. Access to capital and financial services has the potential to increase earnings, facilitate businesses development and improve women's decision-making power in the household (Buvinic and Furst-Nichols, 2016<sub>[52]</sub>); (Buvinic and O'Donnell, 2016<sub>[29]</sub>); (Ngo and Wahhaj, 2012<sub>[53]</sub>). Yet women are not a homogeneous group and not all programmes work across different socio-economic groups (Buvinic and Furst-Nichols, 2016<sub>[52]</sub>).

Access to individual **savings accounts**, with or without restrictions on withdrawals, can increase women's economic independence and business performance by improving their ability to reinvest the money they earn in their own business (Buvinic and O'Donnell, 2016<sub>[29]</sub>); (Ashraf, Karlan and Yin, 2010<sub>[54]</sub>). An intervention in Kenya demonstrates that access to personal bank accounts can raise saving rates, expand productive investments and increase women's individual expenses (Dupas and Robinson, 2013<sub>[55]</sub>). Furthermore, access to financial services, including saving accounts, through self-help groups that gather on a regular basis can improve women's economic empowerment (Brody et al., 2015<sub>[56]</sub>). Group interactions and social exchange improve participants' self-confidence and decision making in the household (Brody et al., 2015<sub>[56]</sub>); (Duvendack and Mader, 2020<sub>[57]</sub>).

Providing women with **small business grants or loans** (microcredit) can lift credit constraints and improve financial freedom (Buvinic and Furst-Nichols, 2016<sub>[52]</sub>); (Fafchamps et al., 2014<sub>[58]</sub>). They may not be sufficient to grow subsistence-level enterprises and substantially transform poor women's economic outcomes. However, they can increase women's freedom of choice in terms of occupation, business investment and risk management (Buvinic and O'Donnell, 2016<sub>[29]</sub>).

**To transform the lives of very poor women, access to small infusions of capital does not suffice.** Instead, bundled interventions, also referred to as the Graduation approach, that include several support measures such as in-kind transfers with technical assistance, intensive training and access to information, cash grants and savings accounts can sustainably improve the livelihoods of disadvantaged women (Buvinic and O'Donnell, 2016<sub>[29]</sub>); (Chang et al., 2020<sub>[59]</sub>); (Banerjee et al., 2015<sub>[60]</sub>). Although these multicomponent programmes require relatively large initial investments, evidence indicates they are cost-effective as they have the potential to lift people out of poverty cycles permanently (Banerjee et al., 2015<sub>[60]</sub>).

**Women's economic empowerment programmes are particularly effective if their design caters to women's day-to-day constraints.** Evidence shows the impact of programmes to improve women's economic empowerment is mitigated by gender-specific social constraints (Chang et al., 2020<sub>[59]</sub>); (Buvinic and Furst-Nichols, 2016<sub>[52]</sub>). For instance, women face greater pressure than men to distribute money they receive to other household members and kin rather than investing it in their own enterprise (Todd, 2012<sub>[61]</sub>); (Bernhardt et al., 2019<sub>[62]</sub>); (Boltz, Marazyan and Villar, 2019<sub>[63]</sub>). To moderate the impact of these constraints, programme design needs to account for women's restrictions and release social pressure (Buvinic and Furst-Nichols, 2016<sub>[52]</sub>). Effective programme adjustments may include hidden transactions to private mobile phones, secured individual saving accounts or in-kind rather than cash transfers to ensure that assets are used to grow women's businesses (Buvinic and Furst-Nichols, 2016<sub>[52]</sub>); (Fafchamps et al., 2014<sub>[58]</sub>).

**Furthermore, discriminatory social norms undermine women's economic empowerment. Changing these norms could have transformative effects on women's economic outcomes. Yet more evidence is needed to understand what works best and why.** Discriminatory social norms and beliefs about what is appropriate for a woman and man to do, and become, continue to undermine women's ability to use, own and control productive and financial resources. For instance, 30% of South Africans believe that men should have more rights to a job when jobs are scarce compared to women; and a third of the population agrees with the

statement that it is almost certain to cause problems if a woman earns more money than her husband (Inglehart et al., 2014<sup>[64]</sup>). Large shares of the population still support the traditional male breadwinner and female caretaker model: more than half of men and women (54% respectively) agree or strongly agree that pre-school children suffer if their mother works for pay (Inglehart et al., 2014<sup>[64]</sup>); and women spend on average more than double as many hours on unpaid care and domestic work than their male counterparts (World Bank, 2010<sup>[48]</sup>); (OECD, 2019<sup>[49]</sup>). Lifting these restrictive beliefs including the unequal burden of unpaid care and housework could have transformational effects on women's investment in their employability and engagement in income-generating activities.

A growing body of literature provides evidence on effective approaches to transform discriminatory social norms. Yet more research is needed to understand what channels work best and why to improve women's economic empowerment. Community, workplace and school-based education on gender (in)equality represent promising arrays in eroding discriminatory social norms, attitudes and practices (Harper et al., 2020<sup>[65]</sup>). To exemplify this, a school-based intervention in India that engaged adolescents in classroom discussions about gender issues reduced support for restrictive social norms and stirred gender-equitable behaviours that were still present two years after the intervention had ended among boys and girls (Dhar, Jain and Jayachandran, 2018<sup>[66]</sup>). Moreover, an intervention in Rwanda demonstrates that sensitising men for reproductive care can lead to higher participation of men in childcare and household work (Doyle et al., 2018<sup>[67]</sup>). Other effective approaches to transform social norms include communications campaign using mass and social media, edutainment – a combination of education and entertainment, in the form of soap operas, radio or TV shows (Marcus and Page, 2014<sup>[68]</sup>); (Haider, 2017<sup>[69]</sup>); (Bicchieri, 2016<sup>[70]</sup>). Despite this evolving literature, more evidence is needed to identify what works best and why to intentionally transform social norms that undermine women's economic opportunities, and the potential effects of these programmes on women's economic outcomes in the short and longer term. Future research may also identify the measures needed to tackle different sets of intersecting discriminatory social and gender norms.

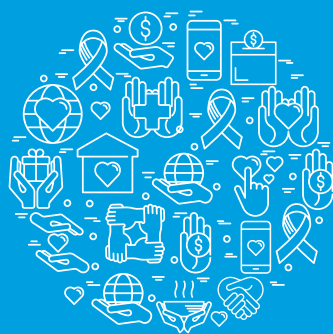
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