THE EFFECTS OF SOCIAL EXCLUSION AND TRANSPORT IN SOUTH AFRICA

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ABSTRACT

This paper presents the finding of the qualitative survey commissioned by the Department of Transport to understand the effect of poor transport on the lives of the socially marginalised. To a great extent there is not enough knowledge about how and why people are excluded. The aim of this research is to identify the transport and accessibility concerns of people living on low incomes and at the margins of economic participation. It would consider the perspectives and circumstances of people living in different geographical/spatial contexts (i.e. inner city, urban, urban periphery, semi-rural and deep rural) and in different life stages (e.g. young people, job seekers, low-paid workers, lone parents, older people, etc.). Moreover an analysis follows on the types of problems they experience, e.g. lack of available transport, access onto the transport system, the cost of travel, lack of information, low travel horizons, the inappropriate location of activity opportunities such as employment, healthcare services, and schools relative to their homes. It highlights such outcomes in terms of their physical and mental well-being, and economic and social activities.

1.   INTRODUCTION

There is a wide range of literature available on transport and poverty in the South African context. The National Household Travel Survey (NHTS) (Department of Transport, 2003) gives considerable statistical evidence of transport disadvantage. What became evident by studying the results of NHTS was the need to better understand the role that transport plays in the social cohesion. To gain this in-depth knowledge and understanding a scoping study was commissioned with socially disadvantage low income communities in the Tshwane area.

This is pioneering research on the direct link between transport related deprivation in the developing world. Data gathered from households to examine the problems experienced by women, the elderly, and disabled, child-head-of-households and public transport users in accessing key facilities and influences on lifestyle. Interviews of policymakers and public transport providers provide insights into the problems of providing public transport to meet social inclusion objectives. This research was not intended to be representative but to offer a 'window' into issues and concerns. More research through surveys and ideally demonstration projects are needed to understand this subject better.

The main themes that will be discussed here relates to the origins of the word 'social exclusion', findings of the Tshwane research and markings for the way ahead.

2.   LITERATURE REVIEW

The term social exclusion originates from French social policy in the late 1980's. It is an invention of Rene Lenoir, then Secretaire d'Etat a l'Action Sociale in the Chirac Government, who published *Les Exclus: Un Francais sur dix*, in 1974. Lenoir's excluded included a wide variety of people, not only the poor, but also handicapped, suicidal people, aged, abused children, substance abusers, etc.

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It was also described as a dynamic process involving:

'… the lack or denial of resources, rights, goods and services, and the inability to participate in the normal relationships and activities, available to the majority of people in a society, whether in economic, social, cultural or political arenas. It affects both the quality of life of individuals and the equity and cohesion of society as a whole.'
(Levitas et al, 2007: 9)

Poverty means a lack of income and exists as a narrower concept than that of social exclusion. Church et al. (1999) Atkinson (1998) and de Haan (1999) all caution that social exclusion should not be confused with either poverty or unemployment for while they are related, being poor or unemployed does not necessarily mean that one is socially excluded or vice versa. Church et al. (1999) argue that the term 'poverty' implies an absolute or relative lack of access to material welfare while social exclusion refers more broadly to the loss of "ability [by people or households] to both literally and metaphorically connect with many of the jobs, services and facilities that they need to participate fully in society" (p.3). In this view, social exclusion is considered a cumulative process in which progressive detachment from jobs, services and to some extent their social networks makes it increasingly harder for people to reconnect and problems spill over from one sphere into another (Church et al., 1999; McCormick & Leicester, 1998). De Haan (1999) indicates that many different processes cause and contribute to exclusion and that it can occur at all levels of society.

The most recent work on social exclusion and transport was done by Dr Karen Lucas (2008). She assisted the South African Department of Transport and Australia to define and recognize the characteristics of it. According to Lucas

  o Not everyone who is socially excluded has a transport problem;
  o And transport alone cannot solve wider problems of impoverished individuals and communities
  o But where a lack of transport is an issue better transport services can have a significant role to play in social inclusion and increased economic participation
  o And providing better transport services an also have an impact on wider social development goals such as health, literacy and quality.

Before Lucas, Church et al (1999) came forward with a broader and holistic approach. To them it was important to identify the factors that may limit or remove the ability of people to access key services. Also to review the transport related indicators that have been used to assess the effectiveness in limiting social exclusion. They identified three processes which may affect households with high levels of social exclusion. There processes are:

• the nature of time-space organisation in households, the interaction between household members and other individuals (e.g. friends and relatives) and the manner in which time-space budgets influence the ability to travel and travel choices;

• the nature of the transport system in terms of cost, network coverage and service patterns, personal security and public space; and

• the nature of the time-space organisation of the activities that people are seeking to access.

Church et al (ibid.) further suggested the following seven categories of sources of exclusion connected to transport. Below are a few, especially of relevance to the focus groups studies that were conducted.

<u>Geographical exclusion</u>

This could refer to the peripheral and spatial provision of transport and is associate with poor transport provision. Based on the segmentation in the National Household Survey, one may include people living in an urban area, urban periphery, rural and deep rural. In South Africa spatial-based inaccessibility means that individuals are unlikely to be able to carry out all their activities within their immediate local area. There is also very little community cohesion compared to the case of Athens. Spatial isolation there has led some local communities to develop strong local informal networks that are beneficial to community cohesion (Vrychea and Golemis, 1998).

During a recent helicopter trip, I took aerial photos of the Mamelodi township. It appears from the photos that some of the locations might not be on the Tshwane database. However the following four aerial photos demonstrate the lack of proper roads and access to decent transport in Mamelodi. This township is considered to be reasonably well developed and not so far from the inner city of Pretoria. Figure 1 shows an almost desolate living area, Figure 2 shows the more developed side of Mamelodi and Figure 3 is excellent to highlight the enormity of the problem.

Figure 1-3: Aerial Photos of Mamelodi. All photos copyright of Laverne Dimitrov (2009) and ITS.

Figure 1:

Figure 2: A more formal Mamelodi

Figure 3: Broad view of RDP houses with dirt roads

Exclusion from facilities: A lack of access to good traditional healers, sports facilities, police stations medical facilities and welfare offices are some examples. According to the NHTS (2003) people can relatively access services quite quickly. For example ninety-five percent of households can get to other essential services such as shops and post offices. Fewer households can get to services such as traditional healers and tribal authorities.

Economic exclusion – where monetary constraints affect the use of the transport network, especially to work.

Fear-based exclusion - Fear, worry and even terror influence how public spaces and public transport are used, especially by women.

Time-based exclusion where transport provision is limited during certain times of the day or where there are individual time constraints.

Space exclusion: access to existing transport facilities is difficult due to their geographical location.

Physical exclusion: These are barriers that inhibit physical access to services, and could be ascribed to perhaps physical and psychological difficulties. Such barriers affect small children, older people, disabled people who cannot read or write and people with learning difficulties.

Several lines of research can better help evaluate transport-related social exclusion and potential solutions. First, we need a standard definition of *accessibility* that can be used by various disciplines (transport modelers and planners, social scientists, social workers, etc.) and practical ways to incorporate it in planning. This will require a better understanding how land use factors and the quality of various travel modes affect accessibility for various groups.

3. METHODOLOGY

Independent consultants were commissioned to undertake a series of 11 preliminary focus group discussions with different economically disadvantaged population groups in the Tshwane region. The key aim of these exercises was to gain an initial understanding of the relationship between poor transport and social exclusion in the South African context. The selected population groups and discussion guide had already been pre-determined.

The focus group discussions were specifically designed to explore the transport and local service accessibility needs of socially marginalised people in five different urban, urban peripheral and semi-rural locations – Mamelodi, Soshanguve, Winterveld, the Danville area and a low income part of Pretoria centre (Sunnyside Arcade). Participants were asked about where they currently need to go to undertake key daily activities such as employment, health visits, education, shopping and other family and social duties. They were asked about the type of transport they use to get to these activities and the (in)adequacy of this in terms of its availability, cost, personal safety and reliability and also what happens when this transport is unavailable to them some or all of the time. A further aspect of the discussions was what better local transport provision might mean to them in terms of their economic and social inclusion.

The focus of the discussion was entirely from the participants' own perspectives and experiences and there was no attempt to validate their narratives in terms of the actual transport delivery in these areas. This approach had proved highly successful in eliciting rich narratives from similar groups of participants in the UK, most of which have also proved to be highly accurate in their depiction of local transport provision when subjected to validation testing against local services. Due to the very personalised and subjective nature of such research, however, it is usual to follow-up such exploratory exercises with more quantitative spatial and statistical studies in order to determine the extent and intensity of the issues under enquiry across the wider population.

3.1 Recruitment

Between 8-10 participants was selected for each of the 11 groups. It cautions that the findings from the group discussions cannot be generalised to the whole of the socially marginalised population due to this small sample size and the non-representative recruiting method that was employed. Nevertheless, the group discussions have served to identify some useful learning in terms of the lives of the participants and the important role of transport in facilitating these.

4. FINDINGS FROM THE TSHWANE FOCUS GROUPS

4.1 Unemployment

For many of the people who participated life are about basic survival and many struggle to put food on the table or provide a roof over their heads. Unemployment levels are high amongst the working age population but the absence of an adequate benefits system means that young people and children as well as the elderly must also seek work.

Jobs are in short supply and so the competition for jobs (especially for low skilled workers) is high. This means that the jobless are often living on hand outs from neighbours and family members who are not much better off themselves. Low pay levels mean that even people with part-time jobs struggle to provide sufficient food for their families. People often take on multiple jobs to survive and work very long hours away from the home.

This often leads to all kinds of associated childcare, family and home maintenance problems. The psychological impacts of poverty on people's lives are enormous. Many participants described themselves suffering low self-esteem and/or depression and in some cases as suicidal.

Most of these problems are out-with the remit of the DOT to address and the key issue is to identify where poor transport causes or exacerbates existing disadvantages and attempt to find appropriate solutions to inadequate transport service delivery in this respect.

4.2 The high cost of transport is clearly a priority issue for many people even in the urban areas where public transport provision is relatively good.

Across the board, the participants described transport as very expensive relative to their incomes. A single journey from areas such as Soshanguve is between R16 and R20 for an average trip to central Pretoria. People working in the city have no choice but to pay this fare because they cannot afford to live in the inner urban areas, but the expense of transport is so great that they feel that it would be cheaper to live in the township if they could find a place because at least then they could walk or use a train.

The cost of transport also has to be juggled with other household bills and childcare if you are in work. For the unemployed it is difficult to afford to search for work or to send their children to school. Those on social grants described these as so inadequate that they cannot afford to eat properly. Many younger people described living with elderly relatives and other family members long after they should be living independently because of lack of income. It makes it even harder to ask for transport fares to search for work in this situation. This results in a downward spiral where even job search activities are no longer a viable option.

In this context, finding ways to subsidise transport for some low income groups is a necessary step in their ability to use transport services to access vital life chance opportunities. The possibility to fund this as a part of the Millennium Goals targets should be explored.

4.3 There is a lack of key public facilities in most of these areas

The most important places people identified as lacking in their neighbourhoods during the focus groups were clinics, shops, police stations, schools and jobs. This means that they **must travel** if they wish to access health clinics, schools, libraries, shops, community centres, recreational facilities and parks. It means that they are even more dependent on the transport services that are available to facilitate their lives, as self-sufficiency is not an option in the townships or outer suburbs due to lack of space. Children grow up in the streets due to the lack of recreational activities and this often leads them into drug taking and minor criminal and anti-social behavior.

Linking transport opportunity with the opportunity to undertake essential and recreational activities will be a key issue in many communities. There is little point in providing transport services if there is nowhere to go.

At national level the DOT needs to link up with other relevant government departments to deliver this agenda and at local level transport planners and providers need to work with community development workers and other local providers to determine how best to achieve better access to their services through a package of suitable measures. These will vary according to different population and geographical contexts.

4.4 **Public transport services (mainly buses but in some instances also train services) are generally unavailable or vastly inadequate and unreliable in most areas outside the city centre**

The participants are using the full range of transport modes to get to places, each with its own set of perceived merits and disadvantages. On the whole, however, there are more actual and perceived barriers to use than benefits across all modes including walking.

People in the suburbs often travel long distances on a daily basis to access work in central Pretoria, leaving home very early in the mornings and returning late at night to sleep. Generally there are no public transport buses serving these routes and so the most frequently used form of transport in these instances is the combi taxis, which are described as in extremely poor condition and over-crowded. The roads are also very poor in many of these more outlying areas which make the long journey very uncomfortable. Loud music in the taxis is also a problem for many people.

In the inner city areas where public transport services are more available, they are seen as unreliable, slow and unsafe. Evening and weekend services are generally considered to be very poor or non-existent. In many instances, wait times are overly long and many routes are inconvenient in terms of matching desired destinations meaning that numerous interchanges are necessary.

Some transport services are considered to be excluding certain people, especially the disabled because of poor vehicular access. Due to their scheduling, many people see buses as for workers and scholars only. Bus services also don't cater for shift workers.

Lack of transport is preventing people who are already in disadvantage from accessing work, education, acute medical attention and primary health care and community and welfare support services. It is therefore a social welfare and community development issue and should be recognised and addressed as such in policy terms. In addition, it is undermining people's quality of life in more general terms, making it difficult to visit friends and family and maintain their social networks.

4.5 **Unregulated combi taxi services are not a suitable way to provide public transport to disadvantaged communities in the long term**.

A comprehensive review of public transport services should be undertaken and attempts made to incrementally introduce a planned public transport network to all areas (this may need to be run along community transport lines in more remote areas). This should be demand (i.e. people and destination) driven, i.e. taking people where they need to go, when they need to get there.

The following are recommendations for basic consideration:

- o making transport more affordable
- o introducing more buses and trains generally but also more evening and weekends services
- o building transport networks that connect people to key services rather than just running along high density transport corridors
- o increasing security on trains and buses but also at stations and bus waiting areas and in taxis (with a focus on reducing drunk driving, driving without licenses and non-roadworthy vehicles)
- o improving passenger comfort
- o finding ways to accommodate people with disabilities on public transport and/or providing them with specialist transport services
- o In addition, better information about public transport services and available travel subsidies and specialist services (if these are introduced) will be necessary.

4.6   Other issues such as high crime and fear of crime have a significant impact on people ability to move around their local areas to access local services but also on their use of transport services, particularly at night.

Most of the areas in which the focus groups were held were considered to be dangerous places to live with people describing their experiences of high levels of robberies, house-breaking, shootings, high-jacking, rape and drug taking and alcohol abuse.

People also described illegal garbage dumping and the problem of pit-toilets, which makes parts of areas hazardous to public health and adds to the feeling of danger in these areas. This means that certain places are considered 'no go areas' for part or all of the day.

DOT needs to identify ways to improve local safety and security in and around transport services through liaisons with local police departments. The provision of safe walking routes should be recognised as a public transport and social inclusion issue. There have been several international studies looking at ways of designing out crime through a variety of measures that could be explored in the South African context.

5.   SUMMARY OF COMMUNITY NEEDS

5.1   Overall community needs

There is great similarity across all the groups in terms of the problems and needs that were expressed. The group participants felt that they were excluded from the following opportunities and facilities:

- A sense of being safe. There is a need for more police stations and better service delivery by the police;
- Job opportunities and skills development;
- Houses, running water, flush toilets;
- Hospitals, clinics and emergency services;
- Shops and public telephones;
- Schools with proper facilities;
- Sports and recreational facilities;
- Community facilities such as libraries, clubs and community halls, especially for the youth.

Although it is not the responsibility of the DOT to provide the facilities and services mentioned above, transport affects access to many of those. It is probably one of the most important community needs and one of the most important tools to improve social inclusion.

5.2   Transport needs

Once again there is great similarity between the different areas and groups. The problems of the socially marginalised people that took part in the focus group discussions are exacerbated by the following:

- High transport costs – there is a need for more affordable transport, especially for the unemployed and pensioners.
- Crime on trains, although there has been some improvement. Even more policing on trains and at stations is needed.
- There are not enough buses and trains. Public transport is crowded.
- The lack of off-peak and weekend buses.
- The fact that taxis are so dangerous – the vehicles are not roadworthy, drivers are often drunk, rude, unlicensed and reckless.

- The lack of transport to clinics.
- The lack of transport for the disabled.
- The lack of transport to clinics.

5.3 Evaluation of modes

The views of the focus group participants regarding the three public transport modes are similar to those of the NHTS respondents. The focus groups also evaluated walking as a mode.

Most respondents use a variety of modes to get to places. It is salient to keep in mind, in way of the lack of safety, that walking is always a part of a public transport journey. Across all modes, there are more disadvantages than advantages.

Mode	Benefits	Barriers
Train	Cheap; safer than taxis in terms of accidents; safer than before on account of security patrols in the train	Crime on trains; shootings on trains; burning of trains; people get thrown off trains; stations not safe; crowded, time tables, unreliable; slow
Bus	Comfortable and safe; weekly and monthly tickets	Slow; expensive; crowded; only for workers and scholars; not wheelchair-friendly; scarce during the day and on weekends; unreliable
Taxi	Fast, flexible, accessible and available	Expensive; not safe; rude and unlicensed drivers; have to wait until taxi gets full; can't carry luggage or wheelchairs
Walking	Saves money; gets you where you want to go; feel-good experience if the facility is close	Not safe, especially after dark; tiring and time-consuming

6. CONCLUSION

This initial scoping study of transport and social inclusion in the South African context has been highly informative and provides a useful first step in identifying some of the key transport and accessibility concerns of people already experiencing disadvantage in the Tshwane region. It is not possible to come to any conclusion about the scale or intensity of transport disadvantage in the locations where the respondents were recruited or for wider Tshwane as a whole. It is possible to say that for the people who we engaged in these exercises lack of transport is a real and substantive issue with often severe consequences in terms of their economic and social welfare.

Unlike in the developed world, where lack of a job can often lead to relative deprivation in terms of the goods and services that can be accessed and is sometimes made more acute when transport is unavailable, in South Africa the negative outcomes are starker. In this context, lack of transport can literally mean an inability to secure the means of survival and is thus a more fundamental policy concern. For this reason, I would argue that available transport to work, learning, healthcare and other key services should be seen as a human right and be included within national and local policy frameworks on this basis.

Further, qualitative and quantitative studies are needed to more effectively determine the nature and extent of transport disadvantage across the whole of South Africa on a region by region basis and for different settlement types and 'at risk' population groups.

Supported by the DOT and other relevant government departments, the individual regional transport authorities should work with other key service providers to rapidly determine the extent and nature of transport disadvantage in their areas and collaboratively develop a set of integrated policy proposals for addressing this issue. It is likely that some piloting studies will be needed to provide expert advice and support regional transport authorities the development of this agenda at the local level. Many programmes and individual projects are likely to already be underway in the different regions with the aim of reducing transport disadvantage. Good practices from these should be identified and more widely disseminated as part of this piloting process.

Once local needs have been determined in each region, a new national delivery framework to address transport disadvantage and monitor progress in this respect should be announced. It is my contention that the delivery of this programme would be best supported by a substantial hypothecated cross-governmental funding resource for this purpose. Outcomes should be monitored alongside Millennium Goals.

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