



### Introduction

Up to the late 1990s discourse analysis has been perceived by many international housing policy researchers as a practice undertaken by researchers working in the field of linguistics or literary criticism (Jacobs 1999:203). However, since then discourse analysis has been recognized as an increasingly important analytical tool in housing policy research (for a few examples see Jacobs, 1999; Hastings, 2000; Marston, 2002). Discourse provides critique through examining the textual data, but also offers conceptual critique focusing on the ideas and influences that led to the documents. In a similar way, academic writing on housing policy also lends itself towards discourse analysis and is regarded as a key source of understanding housing processes (Jacobs, 1999). With a few exceptions (Parnell, 1997; Seekings, 2000; Huchzermeyer, 2001a) discourse analysis has not received much attention in the South African housing policy context.

A number of housing policy amendments have been made in South Africa, with the most recent policy recommendation the *Comprehensive Housing Plan for the Development of Integrated Sustainable Human Settlements*, commonly referred to as the *Breaking New Ground (BNG)* housing plan of 2004. This paper presents a critical discourse analysis on research and influences that led to the *BNG* housing plan. In addition we attempt to determine if similar influences are visible within the academic domain of peer-reviewed publications. Firstly, we give an overview of housing policy development in developing countries and South Africa. Secondly, we review current policies and programs of the *BNG* housing plan and provide a critical discourse analysis of research and influences that resulted in the development of this housing plan. Thereafter consideration is given to authorship of academic publications as well as to the influences on the content of the publications themselves. Lastly the divergence between policy formulations, accredited research publications and housing knowledge is discussed. The main argument we advance is that, in South Africa, there is a divergence between research productions of knowledge on housing which informs policy and research which inform scholars.

### Housing Policy in Developing Countries and South Africa Before 1994

The history of housing policy development (Pugh, 1997, 2001) and the socio-political situation in South Africa (Maylam, 1995; Goodlad, 1997) has been well documented; therefore this section provides merely a brief synopsis on housing-policy development in developing countries and South Africa

Since the 1950s, housing policy in developing countries has evolved through distinct phases, (Pugh, 1997, 2001). During the early 1950s to the early 1960s, the main focus

of housing policy was on state-driven public housing (Pugh, 1997, 2001). From the early 1970s to the mid-1980s the World Bank rose to prominence with adaptations of the self-help housing theories of JFC Turner. Under the influence of the World Bank's policies, governments in developing countries initiated housing projects that concentrated on sites and services as well as in situ slum upgrading. The intensified global economic crisis and continuous urbanisation during the 1980s led to a decline in delivery, maintenance and quality of essential urban services (Pugh, 1997). To assist the bankrupt economies of developing countries, the World Bank and the International Monetary Fund developed macro-economic reform packages of structural adjustment. With the limited success of aided self-help and macro-economic reform policies to meet the demand for housing, the mid-1980s to the mid-1990s saw a shift to the enablement approach. Particularly popular was the idea of providing one-off housing subsidies to low-income earners to buy homes from the private sector (Gilbert, 2002). Within this timeframe, the United Nations' approach to development, which includes elements of environmentalism and sustainability, was also increasingly directed at the housing policy agenda. Finally, from the late nineties to the present, there is an increased focus on poverty alleviation through whole-sector development (Pugh, 2001).

International neo-liberal theories advocated by the World Bank had an impact on the content and development of low-income housing policy in South Africa (Gilbert, 2002). Yet, historical and political factors should also be taken into consideration in order to understand housing policy in South Africa. Two significant features influencing the housing policy environment in contemporary South Africa are, firstly, the democratic election of April 1994, which resulted in a radical transformation in the local government and policy structures, and, secondly, the immense scale and need of housing as a result of urbanization. South Africa had no coherent and legitimate housing policy before 1994 (Maylam 1995; Goodlad 1997). But, a major point of discussion in pre- 1994 policy development was – and still is – the legacy of apartheid and urban segregation policies (Maylam, 1995; Parnell and Mabin, 1995; Goodlad, 1997; Laloo, 1999). Worth mentioning with regard to early housing policy development are the input of the Independent Development Trust housing delivery initiative, the De Looor Task Group proposals on Housing in South Africa, the National Housing Forum and the Reconstruction and Development Program (Adler and Oelofse, 1996; Goodlad, Gilbert, 2002).

### Housing Policy Development in Contemporary South Africa

In line with World Bank proposals, the National Housing Forum developed the basic foundations of the South African housing policy during the early 1990s –the policy framework is set out in the *White Paper on Housing of 1994* (DoH, 1994). The *Housing Act (Act No 107 of 1997)* established the legislative framework for housing policy. A number of amendments have been made to the *Housing Act of 1997*, with

the most recent, the *Housing Amendment Act (Act No 4 of 2001)*. Other legislative documents relating to housing policy include the *Housing Consumer Protection Measures Act (Act No 95 of 1998)*, *Rental Housing Act (Act No 50 of 1999)*, *Prevention of Illegal Eviction and Unlawful Occupation of Land Act, 1998 (Act No 19 of 1998)* and the *Home Loan and Mortgage Disclosure Act, 2000 (Act No 63 of 2000)* (DoH, 2007).

The National *Housing Code* introduced in 2001 is a confirmation of existing housing policies. It sets out the linkages between various policy programs and includes all housing policies amended to date (DoH, 2007). The *Housing Code* focuses firstly on general guidelines and strategies to South Africa's housing policy, secondly on understanding the administrative procedures related to the *Housing Act*, thirdly on the different housing programs in South Africa, and, lastly, on new developments regarding housing policy. The Housing Subsidy Scheme is probably the most widely known of the strategies indicated in the *Housing Code*. In order to qualify for the subsidy, applicants should be South African citizens, earning less than R3 500 ( $\pm$  US \$500) per month, older than 21 years, married or co-habiting and / or single with financial dependants. Low-income people who have received any previous form of subsidies from the government are excluded from the current housing subsidy scheme (DoH, 2007). The maximum subsidy value available to the very poor is R 36 528 ( $\pm$  US \$5215) (DoH, 2007). The amount of the subsidy received by the end-beneficiary is dependent on the joint incomes of spouses (DoH, 2007:377). Households earning between R1501 to R3500 a month – excluding aged, disabled and health-stricken households – are required to make a financial contribution of R2479. Alternatively, beneficiaries may participate in the building of their houses through an approved People's Housing Process Project. In addition, government will assist middle-income households earning between R3500 and R7000 per month by providing a credit- and savings- linked subsidy for their houses (DoH, 2004). The various types of subsidies and programs available to low-income earners include: project-linked, individual, consolidation, institutional, People's Housing Process (PHP), rural subsidies. In addition the subsidy scheme includes information on relocation assistance, the discount benefited scheme, a public-sector hostels redevelopment program, a fast-tracking transitional housing program, housing assistance in emergency housing situations and an informal settlement upgrading program (DoH, 2007:366). Notwithstanding the delivery of more than 1.8 million subsidized houses between 1994 and March 2005, the housing backlog continued to grow, this compelled the Department of Housing to revise their housing strategy (DoH 2007:376).

### Current Policies and Programs

The following section reflects on new developments and policy programs as indicated in the *Housing Code* and confirmed in the *Comprehensive Housing Plan for the development of Integrated Sustainable Human Settlements (Breaking New Ground housing plan)* of 2004 (DoH, 2004). Although no clear new policy direction is given,

the *BNG* housing plan represents a framework for the implementation of housing policy and programs, aiming to eradicate or upgrade all informal settlements by 2014 (DoH, 2007:375). The *BNG* framework is further subdivided in seven business plans that provide detailed information on the programs, with clear indicators of deliverables, time frames and estimated resource requirements (DoH, 2004). The *BNG* housing plan's strategic priorities are not only to accelerate housing delivery but also to improve the quality of housing products and environments to ensure asset creation, ensure an efficient formal housing market – including rental housing – and, to restructure and integrate human settlements. The governments' commitment to these new policy directions was emphasized by the Minister of Housing and key role players in the housing industry by signing a *Social Contract for Rapid Housing Delivery* in 2005 (DoH, 2005).

### Critical Discourse on Current Policy Directions and Programs

Policy directions as reflected in the *BNG* housing plan coincided and were driven by the arrival of the new Minister for Housing, Lindiwe Sisulu (Napier, 2005). The research process was basically derived from three processes. Firstly, in 2003 the Department of Housing commissioned a series of thematic resource papers research papers that were mainly authored by consultants in the housing sector (Napier, 2005). Secondly, the National Department of Housing initiated consultations and workshops in the different provinces, and these workshop results were written up by a consultancy agency (Sigodi Marah Martin, 2003). In 2003, the resource reports and workshop results were presented at the Housing Policy and Research Agenda National Housing Summit. Lastly, the Department of Housing internally reworked information from the resource reports and the workshops conducted in the provinces into different business plans resulting in the *BNG* housing plan. The institutional structure of most policy processes is of such a nature that final policy decision making is done within the ministry. This has resulted in various persons involved in the research process to be disappointed with the outcome of the *BNG* housing plan. Some of the research agendas raised at the National Summit have not been incorporated in the new policy program as was expected (Charlton and Kihato, 2006:259). Charlton and Kihato (2006:261) moreover noted the lack of involvement of key officials in the Department of Housing Department, and also mentioned that political agendas might have played a role in formulating the *BNG* housing strategy. From the above information it is evident that Government set the agenda for policy research. In addition research, specifically research done in consultancy capacity, plays a major role in determining policy directions of the *BNG* housing plan. Thus the impact of research on policy cannot be denied, but although final decisions are influenced by research, decision making processes within government play a greater role in final policy directives.

Thematically, the policy directions of the *BNG* housing plan present a platform for discourse. The influences of the first four interrelated themes from the business plans

of the *BNG* housing plan are discussed in detail, namely the **integration of human settlements** and **support to the entire residential property market**, **rental housing**, including social and backyard rental accommodation, and lastly **informal settlement upgrading**. Other main themes from the business plans in the *BNG* housing plan include aspects of **institutional reform and capacity building**, **housing subsidy funding system reforms**, and **housing and job creation**.

#### Integration of Human Settlements and Support to the Entire Residential Property Market

A key component of the *BNG* housing plan is the integration of human settlements. Integration proposes firm action on spatial restructuring, thus a shift from housing units to sustainable human settlements. In addition, the *BNG* housing plan aims to support the entire residential property market. Increased integration between the primary and secondary housing market is encouraged, particularly in the low-income groups. Urban renewal and inner-city regeneration is also targeted for intervention (DoH, 2004). The roots of inclusionary housing and secondary markets are firmly based in worldwide housing practices of housing and international trends (Smit, 2006). The focus on opening up the secondary market for low-income people can be traced back to the economic ideology and influences of the Peruvian economist Hernando De Soto and his influential book, "The mystery of capital" (2000). De Soto's economic ideas, in line with development agencies such as the World Bank, have received widespread attention particularly in governments of developing countries. His arguments imply that poor people with legal title deeds will be able to use the title deeds as collateral for obtaining credit from financial institutions. More specifically, through formalizing property rights in houses, the possession of title enables people to use their property asset to economically empower themselves (Cousins, et al, 2005:1). The applicability of De Soto's approach to the South African situation has been questioned by various authors (Cousins et al., 2005; Cross, 2006; Royston and Narsoo, 2006:8; Tomlinson, 2006).

#### The Rental Housing Market

Given affordability constraints in the ownership market, the housing backlog is not only limited to the subsidized market (DoH, 2004). The Department of Housing is implementing an affordable rental housing program for households in the low-income and households what is known in as the 'credit gap' market (Rust, 2006:20). The gap market represent households not able to access government subsidies but who are also ineligible for financial assistance through formal mortgage bond assistance (Rust, 2006:30). New measures to address the housing problem for low-income households include support to backyard rental accommodation, the transformation of public-sector hostels into family units, and building new high-rise rental housing stock. (DoH, 2007:378). Although little public policy research has been undertaken in backyard rental accommodation, this private rental sector is seen as a key aspect to

understanding local tenure markets (Royston and Narsoo, 2006:8). The social housing program represents a significant shift in urban development thinking in South Africa and is seen as a mechanism with which to confront the socio-economic and spatial restructuring of the South African landscape (Tonkin, 2006:1). Influences on social housing can be traced back to international discourses in developing countries (United Nations, 2003) and the Millennium Development Goals on the eradication of informal settlements (Cross, 2006). The rental market is seen as a mechanism to control the formalized market of housing and speed up the rate of delivery of housing (Cross, 2006:3). However, case studies from developed countries (with a few exceptions, see Boelhouwer, 2002) on social housing have had limited success in the long term (Lux, 2001).

### Informal Settlements Upgrading

The Informal Settlement Upgrading Program presents a radically different approach towards coping with informal settlements in South Africa (DoH:2004). This program is seen as a paradigm shift from previous policy directions to include communities previously excluded from accessing government subsidies (Huchzermeyer, 2006a; Rust, 2006:11). The program promotes in situ upgrading, and households will only be relocated if all other choices fail. The concept of the informal settlement policy program emanated from international self-help housing theories in the 1960s. But more recently influences on the program are linked to international recommendations and policy documents, specifically the United Nations - Millennium Development Goals (MDGs) (Cross, 2006; Huchzermeyer, 2006a). The MDG 7-11 aspires to achieve by 2020 a significant improvement in the lives of at least 100 million people living in informal settlements. This target builds on the Millennium Declaration on the "Cities without Slums" action plan developed in 1999. Prior to the "Cities without Slums" declaration, the United Nations Global Campaign for Secure Tenure was launched in order to promote security of residential tenure for those people living in informal settlements cities around the world. South Africa, a member state of the Nations Global Campaign for Secure Tenure is responding to the Millennium Development Goals in ways that few other nations in Africa have (Cross, 2006:2). Accordingly, South Africa's *BNG* housing plan aspires to remove or improve all informal settlements by 2014, six years ahead of the United Nations target date (Cross, 2006:2). Huchzermeyer (2006a, 2006b) and Cross (2006) discuss in detail the opportunities, constraints and possible consequences regarding the implementation of the Informal Settlement Upgrading Program.

The *BNG* housing plan seems to be a home document, but elements of international thinking cannot be denied. Many aspects of the *BNG* housing plan are derived from current worldwide practices of inclusionary housing, the economic ideas of Hernando De Soto on formalizing the informal markets and the policy directives of the Millennium Development Goals on the eradication of informal settlements. South



African decision makers noticeably turn to international discourses to find local solutions.

### Peer-Reviewed Publications in Housing Policy in South Africa

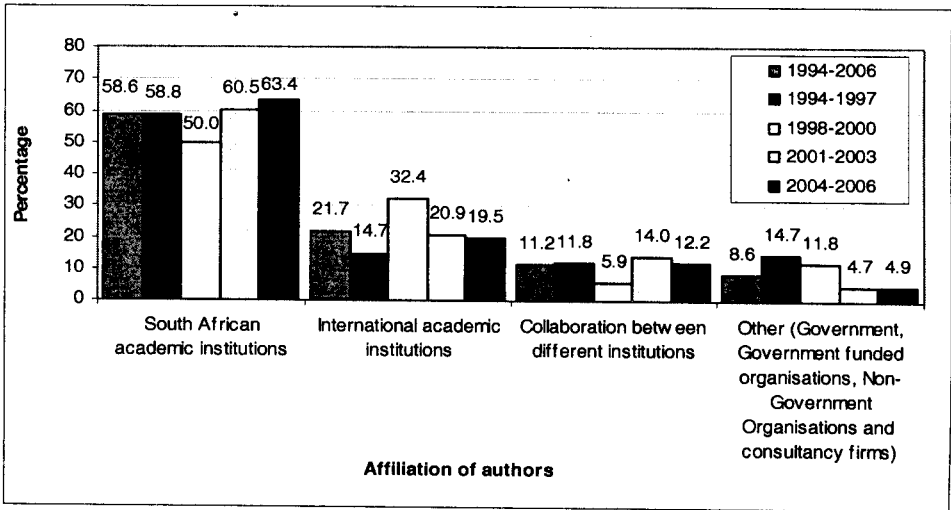
In this section authorship and academic publications on housing policy in South Africa are briefly considered. The main argument we advance is that there is currently a divergence between knowledge production that informs housing policy as discussed in the previous section, and knowledge production through peer-reviewed publications informing international academic discourses.

The results reported here are from peer-reviewed articles that were published specifically on housing policy in South Africa from 1994 to 2006. An important factor in determining the relevance of articles was that the word “housing policy” or “policy” linked with “low-income housing” or “informal settlement” had to be reflected in the title or in the abstract of the article. Articles with secondary or marginal relevance to housing policy with topics such as transportation, health, spatial or urban planning and location choices were excluded from the analysis. The reason for this particular focus on housing policy separate from other urban discourses is that keywords largely determine how we view and write about the world. In addition, globally academics turn to online journals to be informed of global academic discourses. Accredited journals are therefore regarded as a valid source of information on knowledge production. Articles were identified using the electronic academic databases and using the reference lists of the available housing policy articles. The possibility exists that certain articles have not been included due to a lack of keywords indexed in the databases. However, spot checks indicated that more than 95% of articles in the reference lists were included in database results. For our paper, 152 articles with a primary relevance on housing policy in South Africa from 1994 to 2006 were included in the study.

### Affiliations of Authors in Peer-Reviewed Publications

This section gives an overview of peer-reviewed authorship on papers published on housing policy in South Africa. Most articles were single authored (62.5%) while 25% were written by two authors and 12.5% by more than two authors. Although many individuals (162) authored or co-authored articles, only 35 of these individuals contributed to two or more articles. What is more concerning is that only 14 researchers authored three or more articles. This is an indication of the small number of researchers that publish in academic journals on housing policy and the fact that the academia has some difficulty in retaining researchers in the housing field. Figure 1 reflects the institutional affiliations of the authors per article.





**Figure 1 : Affiliations of authors**

As shown in Figure 1, the majority of authors (80.3%) were affiliated with South African and international academic institutions. Levels of collaboration between different institutions (11.2%) and authorship outside the academia (8.6%) were low. This lack of inter-institutional collaboration and authorship from outside the academia raises concern. As mentioned in the previous section, research papers that had an influence on the *BNG* housing plan were mainly authored by consultants. Napier (2005) identified 15 different individuals involved with the literature in the resource reports commissioned by the Department of Housing, of which only three individuals authored articles in academic journals on housing policy or were affiliated with an academic institution at the time of research. Our argument here is not that researchers affiliated with academic institutions have not been involved in the *BNG* policy processes, but rather that the academic outputs from research into housing policy are difficult to quantify and not well documented. In a similar manner, we do not imply that consultants are not able to produce academic or peer-reviewed work. On the contrary, if chapters in academic books and conference proceedings on housing were taken into consideration for this analysis, the value and quality of the research outputs from consultants would be apparent. The point we are emphasizing is that, since academic publications in online- journals are more easily available for scholars to review on an international scale, these articles could lead to a one-dimensional view on housing policy in South Africa.

### Breaking New Ground, Key Topics and Influences as Reflected in Peer Reviewed Publications

Table 1 reflects key topics identified in the academic publications between 1994 and 2006. Some of the articles, with more than one relevant topic were given two keywords.

**Table 1 :** Academic articles published with similar themes reflected in the BNG housing plan

Main topics	Total 1994- 2006 % (n)	1994- 2000 % (n)	1998- 2000 % (n)	2001- 2005 % (n)	2004- 2006 % (n)
Informal settlements upgrading	15.6 (35)	19.6 (9)	8.9 (4)	21.4 (15)	11.1 (7)
Rental housing	10.3 (23)	17.3 (8)	8.8 (4)	5.7 (4)	11.2 (7)
Community participation	8.5 (19)	6.5 (3)	11.1 (5)	7.1 (5)	9.5 (6)
Housing finance	5.4 (12)	2.2 (1)	4.4 (2)	5.7 (4)	7.9 (5)
Legislation relating to policy	3.6 (8)	2.2 (1)	2.2 (1)	7.1 (5)	1.6 (1)
Planning and spatial development	3.6 (8)	2.2 (1)	2.2 (1)	4.3 (3)	4.8 (3)
Construction or design	2.2 (5)	4.3 (2)	0	2.9 (2)	1.6 (1)
Partnerships between different organizations	2.2 (5)	2.2 (1)	4.4 (2)	2.9 (2)	0
Housing rights	1.8 (4)	0	0	1.4 (1)	4.8 (3)
Evictions	1.3 (3)	0	0	2.9 (2)	1.6 (1)
<b>Total –articles with a similar themes reflected in the BNG housing plan</b>	<b>54.5 (122)</b>	<b>56.5 (26)</b>	<b>42 (19)</b>	<b>61.4 (43)</b>	<b>54.1 (34)</b>
Other articles*	45.5 (102)	43.5 (20)	58 (26)	38.6 (27)	45.9 (29)
Total	100 (224)	100 (46)	100 (45)	100 (70)	100 (63)

Source: Venter, 2007. Housing policy research database. University of the Free State: Bloemfontein.

\* Other articles include: reviews of past policies and practice; historical analysis; environmental concerns; housing perceptions; AIDS related issues and a focus on specific groups.

Based on the keywords text alone, it appears that 54.5% of keywords in housing policy articles incorporated some aspects directly related to the BNG housing plan

from 1994 to 2006. In addition, as in the case of the Informal Settlement Upgrading program, academic outputs did have an impact on the development of policy (Huchzermeyer, 2006b). However, to enter into a discussion on the topics of the publications goes beyond the scope of this paper, and as mentioned in the previous section, chapters from academic books should be included to give a more balanced view on the housing policy themes in South Africa. Rather, the purpose of this section is to determine if these academic articles on housing policy reflect the same influences as those mentioned in the *BNG* housing plan. Prominent influences on the *BNG* housing plan discussed in a previous section is linked to international ideas of **inclusionary housing**, **Hernando de Soto** and the **Millennium Development Goals** on the eradication of informal settlements. Since the *BNG* housing plan was approved by cabinet in 2004, we can assume that the majority of research published after 2004 could not have had an influence on the housing plan. A study of the available articles up to 2004 relating to the above mentioned keywords proved to be disappointing. A limited number of publications focused on the concepts of integration of housing, but not in the same context as the *BNG* housing plan. The integration context of the articles is focused on spatial planning (Biermann, 1997; Abbott, 2001; Abbott and Douglas, 2003) and historical (Maylam, 1995; Bremmer, 2000) backgrounds. Many articles give a review on the past influences of international concepts on housing policy (Tomlinson, 2002; Huchzermeyer, 2001b, 2003), but only one article briefly refers to Hernando de Soto (Gilbert, 2002) and none of the articles mentions the Millennium Development Goals. Consequently, it can be concluded that leading influences on the *BNG* housing plan are not reflected in peer-reviewed publications on housing policy. We do take into account that academic research has different intentions than consultancy research and focuses on a different audience than research intended to inform policy. However, if researchers write in academic capacity about policy, the assumption is that at least some articles would reflect on the influences that inform policy. This is of concern, as it seems that scholars on housing policy in South Africa are merely deliberating the housing policy from a thematic perspective without having an influence on policy or considering the broader influences on policy processes.

#### Divergence between the Accredited Research Publications, Policy Formulations and Housing Knowledge

The discourse between the influence of consultancy research and academic research on policy clearly opens itself for debate in South Africa (Cameron, 2005; Atkinson and Bekker, 2004; Visser 2006) and our intention is not to elaborate on this topic in this paper. It would be short-sighted to suggest the division between academics and consultants is universal. We acknowledge that many academic researchers are involved in research outside the academia, but the majority of housing specialists in South Africa can be found outside the academia and they have limited publications in peer-reviewed journals. This probably has an impact on the inadequate reflections of

the *BNG* housing plan in peer-reviewed articles. The low level of involvement in academic publications is not due to a lack of ability to publish good quality articles; it is rather related to time constraints and the unrewarding structure of journals for researchers outside the academia to publish articles. Academic journals do not provide an income, whereas consultancy work does. A greater collaboration between researchers in academic institutions and researchers involved with policy can bridge this divide between research production for policy and that of the academia. The role of academic researchers in informing policy should also be investigated, and researchers in academic institutions should make their work more available and accessible to policy makers. In addition, the point we are emphasizing from a discourse perspective is that academic text in accredited publications should be subject to more rigorous and reflexive discourse analysis. Batten (1999) argues that academics have substantial symbolic power which gives legitimacy to the constructions they make in their writing. Therefore the role of academics in producing knowledge regarding housing policy issues and problems ought to be examined more critically (Hastings, 2000:135). There is currently little evidence that research in peer-reviewed publications on housing policy has made a major impact on policy making processes in South Africa. To a large extent this lack of influence identifies a gap which exists between the practice of policy and theoretical studies undertaken by academics. Within a critical discourse framework, policy research and texts are the medium through which housing problems and solutions are documented. In line with Hastings (2000) arguments, the engagement with discourse analysis within housing studies provides means to investigate new empirical territory and different tensions within housing policy processes.

As shown in this paper, not only policy texts lend themselves to an analysis of discourse, but also the research that informs and reflect on policy. We used the *BNG* housing plan as case study in order to analyze authorship of research which informs policy and research that informs peer-reviewed publications. The evidence in this paper firstly shows that housing policy in South Africa is amended on a regular basis to reflect societal demand. Secondly, the *BNG* case study demonstrated that research agendas were driven from within government and that research does have impact on policy. Just as government and individuals in positions of authority determine the research agenda they also determine the influence that research will have on policy. Therefore power relations are also an aspect that should be kept in mind when determining influences on policy. Thirdly, only a small number of academic researchers focus specifically on housing and policy related issues. Lastly, although some thematic aspects overlap with the *BNG* housing plan, the influences identified in this policy strategy are not adequately reflected in academic publication.

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