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ASSESSMENT OF THE SOCIAL IMPACT OF ADOPTION OF CODES OF PRACTICE IN THE SOUTH AFRICAN WINE INDUSTRY



**Final Report
September 2005**

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International
Development

Acknowledgements

This document is an output from a project funded by the UK Department for International Development (DFID) for the benefit of developing countries. The views expressed are not necessarily those of DFID.

Our thanks go to the field research and data analysis team; Fadeela Ally, Clinton Daniels, Levurn Jacobs, Karen Kleinbooi, Sandra Kruger, Cheryl Linders, Cedric Loots, Gerald Muller, Bernadine Payi, Anton Pickard.

We thank Dr Paul Cluver for endorsing the project in his capacity as Wines of South Africa (WOSA) Chair (of the Board of Trustees).

The study would not have been possible without the participation of the 20 farms/cellars and their employees who gave their time to participate in the project. The farms included in the study are not identified by name, since in order to respect confidentiality, an undertaking was given that no farm, cellar, employer or employee would be mentioned by name in any report or publication.

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TABLE OF CONTENTS

	Page
EXECUTIVE SUMMARY	i
Summary of conclusions and key recommendations for industry stakeholders	iv
1. THE CONTEXT: THE SOUTH AFRICAN WINE INDUSTRY IN TRANSITION.....	1
1.1. The wine industry's contribution to the regional and national economy	1
1.2. Poverty in the wine lands of the Western Cape.....	1
1.3. Current production in the wine industry.....	1
1.4. Historical perspective on the industry	3
1.5. Recent developments in the industry.....	4
1.5.1 <i>Trends in the global wine market</i>	4
1.5.2 <i>Response of South African growers</i>	6
1.5.3 <i>The cellar sector: concentration and diversification</i>	6
1.5.4 <i>Between the farmer and the state: the changing position of labour</i>	8
1.5.5 <i>Forces for change</i>	9
2. STAKEHOLDERS IN THE SOUTH AFRICAN WINE INDUSTRY.....	13
2.1 Farmers	13
2.2 Cellars.....	14
2.3 Wholesalers	14
2.4 Labour	14
2.5 Institutions	15
3. PROJECT PURPOSE, OBJECTIVES AND METHODOLOGY.....	16
3.1 Purpose	16
3.2 Methodology	17
3.2.1 <i>Overview</i>	17
3.2.2 <i>Selection of companies</i>	19
3.2.3 <i>Data Collection</i>	22
3.2.4 <i>Sampling</i>	22
3.2.5 <i>Limitations</i>	23
4. ASSESSING THE IMPACT OF CODES OF PRACTICE.....	23
4.1. The Industry	23
4.2. The Companies.....	24
4.2.1 <i>Code Adopters</i>	24
4.2.2 <i>Non-Adopters</i>	27
4.3. The Workers	28
4.3.1 <i>Permanent workers at adopting and non-adopting companies</i>	28
4.3.2 <i>Women and men permanent workers at code adopting companies</i>	32
4.3.3 <i>Permanent women and men workers at non-adopting companies</i>	34
4.3.4 <i>Casual workers at code adopting and non-adopting companies</i>	35
4.3.5 <i>Women and men casual workers at non-adopting companies</i>	37
4.3.6 <i>Casual workers at code adopting companies & permanent workers at non-adopting companies</i>	38
4.3.7 <i>Overall ranking of workers conditions</i>	40
4.4. Household case studies.....	41
4.5. Communities	47
5. CONCLUSIONS AND RECOMMENDATIONS	48

REFERENCES	52
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LIST OF ANNEXES

Annex 1: Comparison of the ETI and SA8000 codes	54
Annex 2: Priority areas articulated by workers during participatory phase	56
Annex 3: Profiles of participating companies	57
Annex 4 Questionnaires	64
Annex 5: Analysis of baseline and monitoring cycle data	74

LIST OF TABLES AND FIGURES

Table 1: Categories of wine and market characteristics	5
Table 2: Project stages and sample sizes	19
Table 3: Company sample by region and status before extended baseline survey	21
Table 4: Farms remaining for comparative analysis at the end of 2004	21
Table 5: Companies included in the statistical analysis	22
Table 6: Final sample of companies included in the statistical analysis	22
Table 7: General profile of permanent workers	28
Table 8: Housing of permanent workers	29
Table 9: Material wealth of permanent workers.....	29
Table 10: Social well-being of permanent workers.....	30
Table 11: Empowerment of permanent workers	31
Table 12: General profile of women & men permanent workers at code adopting farms .	32
Table 13: Housing of permanent women and men workers at code adopting farms	32
Table 14: Material wealth of women & men permanent workers at code adopting farms	33
Table 15: Social well-being of women & men permanent workers at code adopting farms	33
Table 16: Empowerment of women and men permanent workers at code adopting farms	34
Table 17: Material wealth of women and men permanent workers at non-adopting farms	34
Table 18: Social well-being of women & men permanent workers at non-adopting farms	35
Table 19: General profile of casual workers at code adopting and non-adopting farms....	35
Table 20: Housing of casual workers at code adopting and non-adopting farms	36
Table 21: Material wealth of casual workers at code adopting and non-adopting farms...	36
Table 22: Social well-being of casual workers at code adopting and non-adopting farms	37
Table 23: Empowerment of casual workers at code adopting and non-adopting farms	37
Table 24: Material wealth of women & men casual workers at non-adopting farms	38
Table 25: Social well-being of women & men casual workers at non-adopting farms	38
Table 26: Empowerment of women and men casual workers at non-adopting farms	38
Table 27: Housing for casual workers at code adopting farms and permanent workers at non-adopting farms.....	39
Table 28: Material wealth of casual workers at code adopting farms and permanent workers at non-adopting farms.....	39
Table 29: Ranking of workers in terms of impact indicators	40
Map 1: Major wine growing areas of the Western Cape.....	20
Figure 1 The South African wine industry structure	2
Figure 2 Study Comparisons	17

LIST OF ACRONYMS

BRC – British Retail Consortium

CCMA – Commission for Conciliation, Mediation and Arbitration.

CSR – Corporate Social Responsibility

CWSI – Cape Wine and Spirits Institute

ETI – Ethical Trade Initiative

FAWU – Food and Allied Workers Union

FWSES - Farm worker share equity scheme

HACCP - Hazard Analysis and Critical Control Point

KWV- Ko-öperatiewe Wijnbouwers Vereniging van Zuid-Afrika

NUFBSAW – National Union of Food, Beverage, Spirits and Allied Workers

R – South African Rand

SAPAAWU – South African Plantation and Allied Workers Union

SAWB – South Africa Wine and Brandy Company

SAWI – South African Wine Industry

SAWIS – South African Wine Industry Information and Systems

SAWIT - South African Wine Industry Trust

WIETA - Wine Industry Ethical Trade Association

WOSA - Wines of South Africa

ASSESSMENT OF THE SOCIAL IMPACT OF ADOPTION OF CODES OF PRACTICE IN THE SOUTH AFRICAN WINE INDUSTRY

EXECUTIVE SUMMARY

The aim of this 3 year study (2002-2005) was to assess the social impact of the adoption of codes of practice, in order to establish whether codes of practice can make a positive difference to workers' conditions and livelihoods and to impoverished local communities in Sub-Saharan Africa. This report presents the findings from the study of social impacts of code adoption in the South African wine industry.

South Africa is currently the world's eighth largest wine producer. Wine exports were 240 million litres in 2004; around 33% of total production. The South African wine industry supports full time employment for approximately 67,000 people. A similar number of seasonal workers are employed on a part-time basis during the grape harvest. Together with employment in wine retailing and wine tourism, the industry supports approximately 257,000 people.

The South African industry has faced a range of challenges in recent years. Globalisation, deregulation and legislative change are reshaping traditional industry power relations between growers, cellars and retailers. The wine grape commodity system is being restructured in complex and contradictory ways with consequences for growers. Codes of practice arrived in the South African wine industry in 1998 when the UK-based Ethical Trading Initiative (ETI) began a pilot involving six wine producers supplying UK supermarkets.

At the start of this study, participatory assessment of the priorities of different groups of workers, categorised by gender and work status, identified considerable overlap in the long lists of needs articulated by each group, but also differences in the way they were ranked. Whilst labour codes of practice cannot necessarily be expected to cover all of the priorities of workers, it is clear that there is some divergence between code provisions and worker priorities in some key areas. Greater flexibility within codes would allow the needs prioritised by workers to be accommodated.

Structured interviews with workers and managers over a three year period generated data on the relative material wealth, social well-being and empowerment of men and women workers at code adopting companies compared to non-adopting companies.

The overall finding was that workers at code adopting companies in the Cape wine lands are better off than their counterparts at non-adopting companies – whether they are employed on a permanent or seasonal basis. The status of the company (code adopting or code non-adopting) is the most important variable determining the position of workers. Job status (permanent or casual) is more important than gender in determining the position of workers.

Comparing permanent workers at code adopting companies with permanent workers at non adopting companies, the former are *materially* better-off in terms of wages, housing, consumer durables and cars. The wage gap widened over the course of the study. Permanent workers at adopting companies also experience a greater feeling of job and tenure security, higher health care subsidies, better access to day care facilities,

protective clothing and HIV/AIDS education. The educational level of permanent workers at adopting farms is higher – which is possibly why workers at these farms are employed in more skilled and better-paid jobs, with more scope for upward mobility than on non code adopting farms. There was no evidence of payment in alcohol or child labour on either type of farm, and few workers reported physical abuse by the employer.

Permanent workers at code adopting companies are better off in terms of *empowerment* indicators compared to those at non-adopting companies. More of the former have written employment contracts, one-fifth benefit from some empowerment scheme. However, more workers are unionised in non-adopting companies compared to adopting companies.

The better position of permanent workers at code adopting companies compared to non-adopting companies cannot be solely attributed to the impact of codes of practice. An important factor is the socially progressive nature of the companies that have led the way in code adoption, several of whom had already introduced social development programmes well before the adoption of codes in 1999/2000.

In terms of gender comparisons, on code-adopting farms, male workers are, on average, better off than their female counterparts in terms of material wealth, although women do better in social well being. There is parity on *empowerment* indicators, except for the benefits of an empowerment scheme, in which more men than women are members. Over the period of the study, both the adopting and non-adopting farms reduced the number of women in their permanent employ and there was also a decline in the proportion of female casual workers at both types of farm.

Casual workers at non-adopting farms are in the most disadvantaged position in the South African wine industry. Casual workers at code-adopting farms are better off than their counterparts at non-adopting companies on indicators of material wealth, social well-being, housing and empowerment. The cash wage for casuals at both types of companies rose over the two-year period, although much more dramatically in the case of adopting farms, bringing these casual workers up to the level of permanent workers at non-adopting companies. Casual male workers employed by code non-adopting companies do least well of all worker categories. On most indicators of material wealth, social well-being and empowerment, casual women workers do better than their male equivalents on non-adopting farms.

The increasing competition in the international wine industry is stimulating the trend towards casualisation of the labour force. The study provides further evidence for the trend for the core of permanent, on-farm workers to get smaller, while casual labour increases and the divide between these two sectors of the labour market deepens. The demand for improved quality encourages investment in skills training for a shrinking specialised core of permanent and increasingly male employees, while the drive to cut costs promotes the use of more cheaply employed casual workers for unskilled tasks. Given the market pressures, it is unlikely that codes could be extended to casual workers on a scale significant enough to address the growing distinctions between casual and permanent workers.

A key area requiring attention is the need for improved worker awareness of codes. Communication and integration of codes into day-to-day company practice is essential

to keep them ‘alive’ as part of a more ‘transparent’ and participatory management style. Workers and their representatives at cellars and farms need training in the implementation and monitoring of codes. To sustain motivation and commitment, benefits to the business flowing from adoption also need to be communicated to all company employees.

There is potential for greater code impact in future as the ETI pilot project is rolled out via the Wine and Agricultural Ethical Trade Association (WIETA). By the end of the study, managers of non-adopting farms were more aware of codes and three had signed up to WIETA.

A range of positive views on codes were expressed by managers of adopting farms; they were said to have improved access to export markets; strengthened capacity amongst worker representatives, increased awareness of health and safety issues and prompted them to put a management information system in place. However, none of the farm managers thought that adoption had given them a competitive advantage in the market.

The relationships between suppliers and retailers in international markets are crucial and can either support, or undermine initiatives to improve worker welfare. The potential for wider code adoption is heavily influenced by how retailers do business and how this impacts on suppliers. There is little incentive for suppliers to adopt codes when retailers’ purchasing practices are determined by market-driven price negotiations and business outcomes, or when suppliers are expected to absorb the additional costs of code compliance. Although an increasing number of farmers and cellars are embracing codes, the main motivation is to secure market entry. If ethical commitment could be linked to clear financial incentives, codes of practice would spread much faster and would be adopted more fully and enthusiastically by farm owners and managers.

The introduction of codes has focused the debate on social change and human development, informing exporters in clear terms what the most important foreign markets require in terms of labour, health and environmental standards. Thus, if workers’ lives in these regions change for the better over the next few years, it is also because the codes have provided a clear, simple benchmark. In that sense they will have an effect on whole communities.

Summary of conclusions and key recommendations for industry stakeholders

<i>Conclusions</i>	<i>Recommendations</i>
<p>Worker welfare on code adopting farms is generally better than that of workers on non-adopting farms, particularly for permanent workers, but the attribution of this to codes is not always clear-cut.</p>	<p>1. Researchers, donors and the South African government should continue to investigate the impact of codes as they spread further throughout this industry and to explore and pilot other approaches to promoting worker livelihoods and empowerment.</p>
<p>Suppliers' attitudes are fundamental in accounting for relative impacts following code adoption. Those pre-disposed to socially progressive action are more likely to implement codes of practice. Where adoption is externally imposed it is less likely to be far-reaching or effective in improving worker livelihoods</p>	<p>2. Retailers and donors to support improved training of suppliers and buyers. 3. Code bodies to encourage industry wide exchange of suppliers' experience with code implementation.</p>
<p>Casual workers at code-adopting farms are better off than their counterparts at non-adopting, but the gap between casual and permanent status is growing. It is unlikely that codes could be extended to casual workers on a scale significant enough to address these growing distinctions.</p>	<p>4. Researchers, donors and the South African government should establish the potential benefits of fair trade schemes in the wine industry over and above the adoption of minimum standards, as well as the opportunities in organic wine. 5. NGOs, trade unions, donors, developing country governments should support the empowerment and organisation of casual workers.</p>
<p>Worker awareness of codes of practice - their purpose, scope and content - is limited.</p>	<p>6. Further efforts are needed to improve worker awareness of codes of practice and labour laws, so that these are communicated in the workplace and integrated into day-to-day company management practice. 7. Given the context of poor levels of worker representation and risks to worker rights, Donors, retailers, and suppliers, in collaboration with NGOs and worker organisations should pilot projects to build worker awareness of the implementation and monitoring of codes and labour laws, drawing on different media and learning from experience elsewhere in the world.</p>
<p>Codes should be sufficiently flexible across international boundaries to accommodate the needs prioritised by workers.</p>	<p>8. Code bodies, donors, civil society should ensure that the priorities and knowledge of workers feed into the code formulation process and into the monitoring of compliance, via continued evolution of participatory social auditing and advocacy.</p>

<p>There is a need for building capacity of worker organisations and the level of worker representation</p>	<p>9. Donors, NGOs, code bodies, trade unions and developing country governments should find ways to support the participation and empowerment of workers, for example, in researching different options, piloting dialogue with progressive managers and building the capacity of worker organisations.</p> <p>10. Suppliers should communicate information on business performance in export markets since the adoption of codes, to all company employees.</p>
<p>The creation of WIETA is a positive step.</p>	<p>11. Donors and researchers should track the development of such local bodies in terms of how well they are able to: a) improve worker livelihoods; b) how far they can improve the effectiveness of auditing; c) improve worker and civil society participation in code development, auditing and activities for worker empowerment; d) whether they increase their membership and the reach of codes; e) their potential limitations in terms of worker empowerment; f) their performance in comparison to similar bodies in other industries and compared to alternative approaches to improving worker livelihoods.</p> <p>12. NGO, trade union and donors should support training for workers and worker representatives at cellars and farms to facilitate their participation in bodies such as WIETA that aim to improve worker conditions and to develop locally appropriate and cheaper auditing and monitoring mechanisms.</p>
<p>Retailer purchasing practices undermine suppliers' efforts and support for improving worker conditions and are a disincentive for suppliers to adopt codes.</p> <p>Codes would spread faster and be adopted more fully and enthusiastically by farm owners and managers if a financial incentive structure was in place.</p>	<p>13. For code implementation to have a real impact, changes are needed in the purchasing and business practices of retailers. Donors, NGOs and the research community to support research on how to reform the governance of the buyer-driven value chain.</p> <p>14. Training for buyers is important and NGOs, researchers and donors could provide financial and technical support to retailers in piloting different approaches and developing concise private sector-targeted training materials and courses etc.</p> <p>15. Retailers should wholeheartedly support initiatives such as WIETA, including providing financial support to help reduce auditing costs for suppliers and make auditing more appropriate to local conditions and worker priorities.</p> <p>16. Donors should lobby for retailers to change their purchasing practices, share certification costs, and support the development of local code bodies.</p>
<p>South African farmers and companies feel that retailers are inconsistent in what they require of suppliers in different parts of the world.</p>	<p>17. Retailers to be consistent in requiring suppliers worldwide to implement codes of practice, extending the uptake of codes, and crucially, imposing penalties for non-compliance. Donors and civil society to lobby for such consistency.</p>

<p>The introduction of and pressure to adopt ‘codes of practice’ have increased the focus of debate in S.A. on social change particularly in terms of labour and human development.</p>	<p>18. Donors to find ways to support continued momentum for embedding minimum standards and finding alternative strategies for worker empowerment. Funding for initiatives to enable dialogue between workers and suppliers, buyers and retailers together along the supply chain could help workers increase their voice and influence.</p>
<p>Integrated M&E is required as a learning approach</p>	<p>19. Code bodies, retailers and suppliers to develop Monitoring and evaluation systems for learning about change, in collaboration with NGOs, worker organisations, trade unions etc. Local civil society stakeholders to be involved (researchers, NGOs, trade unions, worker representatives) to provide a level of independence.</p>

1. THE CONTEXT: THE SOUTH AFRICAN WINE INDUSTRY IN TRANSITION

1.1. The wine industry's contribution to the regional and national economy

In 2003, the total turnover of the South African wine industry (SAWI) amounted to approximately R 10,675 million. Primary agriculture contributed R 2,597 million to this figure. Forty three per cent of all tourists to South Africa visit the wine lands. Seventy per cent of the industry's activities have a direct impact on the Western Cape Province's economy. Wine is responsible for 50% of the province's agricultural exports. In 2003, the industry contributed 8.2% to the province's Gross Geographic Product (GGP) (SAWIS, 2004: 2-3).

The SAWI supports employment opportunities for approximately 257,000 people. Primary viticulture (i.e. farms) provides 24% of these jobs. If employment at cellars is added to this figure, it amounts to approximately 67,000 jobs.

In 2003, the industry generated a total household income of R 10,607 million. Of this 18% went to the 'lower income groups' (SAWIS, 2004: 4).

1.2. Poverty in the wine lands of the Western Cape

Although the Western Cape has the highest score (i.e. 0.77) of all nine provinces on the Human Development Index (HDI), almost 30% of the population live below the poverty line (i.e. R 354 per month per adult equivalent; UNDP, 2003). Like the rest of South Africa, poverty in the Western Cape also exhibits a spatial bias; most of the poor are to be found in the rural areas. Unemployment is so high that many households would not survive without government grants.

In recent years rural poverty has increased due to the in-migration of mainly Xhosa speaking people from the Eastern Cape. The in-migration manifests itself not only in the huge informal settlements of greater Cape Town, but is visible all over the province in the form of rural shanty towns. Although these present themselves to the farmer as readily available pools of cheap labour, only a fraction of the unemployed find a job. If they do, it is mostly as intermittent seasonal labour during the grape or fruit harvest, or at other peak times of the year.

Compared to casual labourers, workers employed permanently on the farm are amongst the more fortunate sections of the rural population. At least they have a regular income and a sturdier dwelling to come home to. Not only that; because of their permanent status, and the fact that most reside on the farm, changes in the way the farm is managed – positive or negative – are bound to affect them more directly. If anything, codes of practice will have a greater impact on their lives than on those of the very poor living on the margins of the rural Western Cape.

1.3. Current production in the wine industry

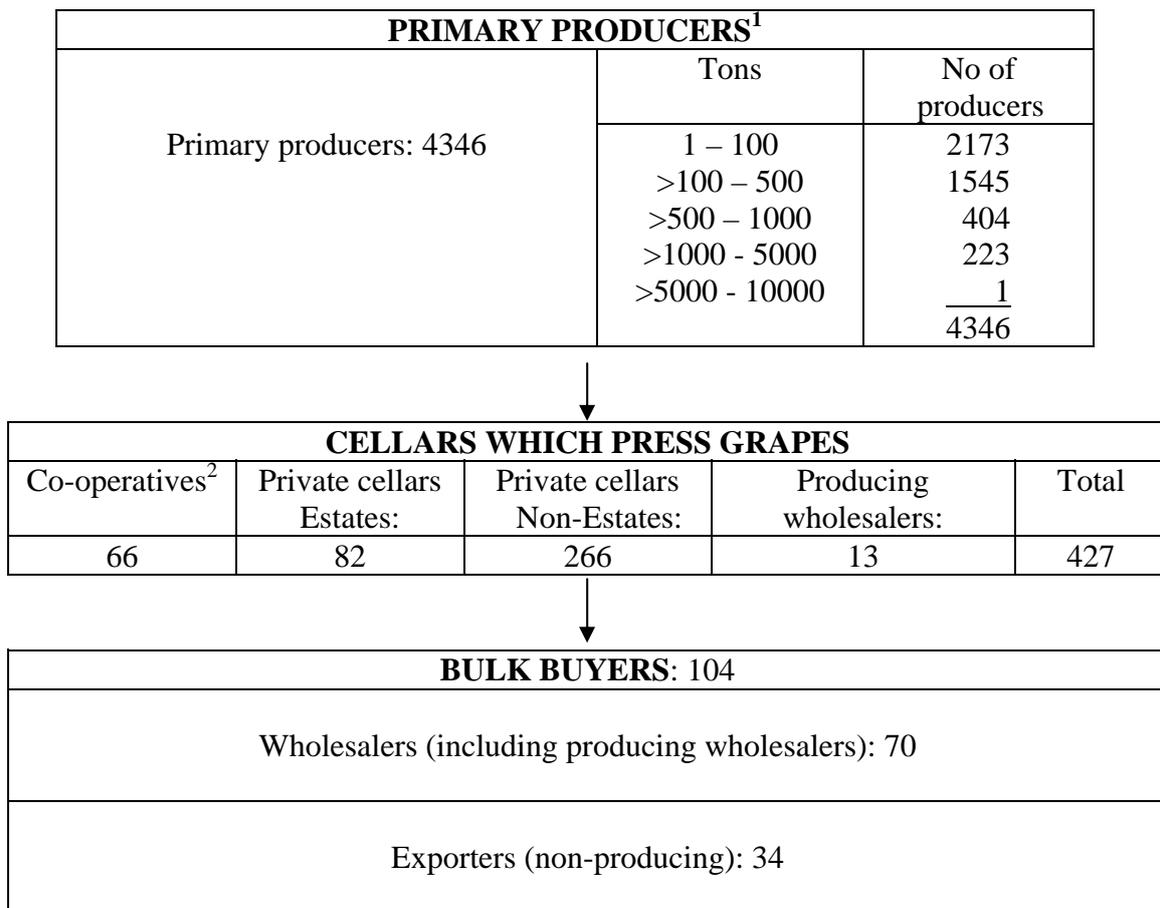
Salient characteristics of the South Africa Wine Industry are as follows;

- Today South Africa is the world's eighth largest wine producer (Keevil, 2004: 425)
- 106,000 hectares are planted under wine grapes (Vink, Williams and Kirsten, 2004)

- Grapes are produced by approximately 4,300 growers¹.
- 408 million litres of table wine were pressed in 2003² by a total of 428 cellars (Vink, Williams and Kirsten, 2004: 242).
- In 2003, approximately 240 million litres were exported (SAWIS, 2004), compared to 23 million litres in 1991 (Keevil, 2004: 426).
- 43% of all tourists to South Africa visit the wine lands³
- The industry provides full-time employment to approximately 67,000 people. Of these, some 61,000 are farm workers (SAWIS, 2004). Almost the same number of seasonal workers are employed on a part-time basis during the grape harvest

The current structure of the industry is shown in figure 1.

Figure 1: The South African wine industry structure



Note: ¹ Producers sell to producing wholesalers, wholesalers, retailers, the public and to exporters.

Note ² This does not take account of co-operatives which have recently amalgamated or converted into companies.

Source: Vink, Williams and Kirsten, 2004.

¹ Personal communication, Kobus Dowrie, Minister of Agriculture, Western Cape, address at the WIETA AGM, Stellenbosch, 7.12.04.

² Dowrie, ibid.

³ Dowrie, op cit

1.4. Historical perspective on the industry

Although commonly described as a ‘New World’ wine country, winegrowing in South Africa is anything but ‘new’. In fact the first vines were planted by the Dutch settlers as early as 1655.

After early successes like the Constantia region’s famous dessert wine *Vin de Constance*, the industry subsequently suffered many setbacks. For instance, the industry floundered when the UK – the main importer of South African wine – dropped protective tariffs on French wines in the 1860s, making them cheaper than the South African wines. The spread of phylloxera in 1885 destroyed many vines. This was followed by the problem of overproduction in the early part of the 20th century, when a wine farmer’s success was associated with high yields. Although it resisted at first, the then government eventually gave in to the demands of the wine farming lobby and by way of statute gave a giant co-operative, the “Ko-öperatieve Wijnbouwers Vereniging van Zuid-Afrika” (KWV) the statutory powers to regulate the industry. From 1918 onwards the KWV had the power to control sales and stabilise prices. Over the years these powers were expanded to include a quota system which limited attempts to plant in new places. The KWV’s quarantine system strictly dictated which new vine material could be imported. This limited farmers’ growing options, especially those of the estates and private cellars which tended to be more entrepreneurial than the average co-op farmer. The upshot of the whole regulatory regime was that it encouraged the production of quantity or volume, instead of quality. The final blow was the imposition of international trade sanctions in the 1980s as a protest against the apartheid regime (Keevil, 2004; Vink, Williams and Kirsten, 2004).

Throughout the 20th century the co-operative wine cellars formed the backbone of the industry. Not only were they responsible for the largest proportion of production, but they were also linked closely to the networks of white power in the rural Western Cape. Formal institutions such as the National Party obviously played a key role; but as important were the informal networks of filiation and affiliation between key settler families – and the way these networks allowed political control of civil society and agro-institutions.

As important as the sector’s orientation towards bulk wine production was its dependency on cheap black labour. Until the 1980s, labour arrangements on South African wine farms were characterized by a racially hierarchical and authoritarian paternalism inherited and adapted from early Cape slave society. Farming styles in the Western Cape and beyond were shaped by the expectations of the white settler elite that controlled most of commercial farming and by the values of patriarchal white mastery that were such an important part of this elite’s cultural framework.

The relationships between farm owners and workers have not been simply exploitative, but were shaped by the discourses of paternalism. The notion of themselves as benevolent, but firm protectors and disciplinarians of a grateful and appreciative population of on-farm servants has been an important part of the self-conception of farmers in the Western Cape and elsewhere in South Africa since the eighteenth century. Ultimately, however, it was a hierarchical relationship, marginalizing and silencing the voices of those whose labour helped create the wealth of the sector.

Neither has paternalism persisted unchanged since the end of slavery. Rather, its survival has been a matter of mutation and adaptation in the midst of capitalist modernisation. In the 1980s, this process of modernisation gained particular impetus through initiatives for ‘social upliftment’ by people from within the industry itself. ‘Upliftment’ would not only reduce social costs, but also improve productivity and the poor image of the industry in the face of looming sanctions.

In the event, these efforts did not succeed in staving off sanctions. Neither did it succeed in creating the committed, contented workers its proponents hoped for. Part of the reason is that the reforms themselves were hopelessly compromised. Like the broader racial order itself, the power relations of white mastery were never up for debate. These reforms, far from transforming on-farm practice, created at most, a kind of ‘neo-paternalism’ – a hybrid formation in which elements of modern and paternalist farm management existed, sometimes uncomfortably, side by side (Ewert and du Toit, 2005).

1.5. Recent developments in the industry

However, over the last ten years or so, the industry has changed dramatically. This has come in response to a number of changes in its environment, presenting a mix of opportunities and challenges:

- The end of apartheid heralded the lifting of sanctions and the re-entry of South Africa into world markets
- The end of regulation by the KWV
- The transition to democracy signalled the extension of a plethora of labour legislation to agriculture.

This ‘triple transition’ has had complex, mutually overlapping and reinforcing effects. On the one hand, the industry has seen lateral expansion and an impressive, sustained rise of exports. On the other hand, many co-operative wine cellars and their members have found it very difficult to re-gear themselves away from the industry’s historic orientation towards bulk wine production, and to face up to the ‘quality revolution’ and the demands of supermarket wine retailers. Power is shifting downstream; away from primary producers to processors and marketers.

1.5.1 Trends in the global wine market

When South African growers, winemakers, cellar managers and other stakeholders in the wine industry woke up to deregulation and the end of sanctions, few had any knowledge of either international market trends or marketing itself. Gradually, however, they came to realise that four linked trends in the international alcoholic beverage market and its commodity systems play a particularly important role. Firstly the global beverage industry has increasingly come under pressure, partly because of increasing health concerns among consumers, especially those in the ‘old’ wine countries. It is for the same health reasons that consumers are increasingly turning to red wines, away from white. Thirdly, the wine market has been increasingly affected by the growth of supermarket wine retailers, which have fundamentally changed the way in which wine is consumed and marketed. This is closely linked to the fourth trend, which is the

increasing prominence in the premium and super premium⁴ wine market of branded wines, promising to deliver not only quality but also consistency.

Table 1 Categories of wine and market characteristics

Basic	Premium	Super Premium	Ultra Premium	Icon
Comprise about 50% of the international wine market; are anonymous, with little or no linkage to vineyards or even countries.	Comprise about 30% of the wine market: usually of better quality; often retail through the supermarkets in the “value for money” market; usually linked to distinct brand (rather than vineyard or cellar) identities	Comprise about 10% of the wine market and sell on the basis of quality, style and perceptions about their unique identity in the market	Highly distinctive and individual quality; not marketed on a mass basis	Wines whose value is mainly linked to the act of purchasing them. (Loubser, 2001).

Together, these trends have meant that wine markets have been characterised by increasingly divergent price trends. Low-priced blended table wines have poor prospects in a world where consumption has fallen by a quarter since 1982. In France and Italy – the bastions of working class wine drinking - consumption has halved in the past thirty years. At the same time, there is a global trend towards buying better-quality wines (Rachman, 1999). While wine sales at lower price points have remained stagnant, higher price points have shown buoyant growth. At the turn of the new century the most lucrative price bracket was at over 4 pounds sterling in Britain and \$7 in the USA. In the latter market, wines selling at more than \$7 account for only 22% of sales by volume, but almost 50% of revenues. As *The Economist* put it in a survey of the international wine industry: ‘...[T]he message is clear: the best place is at the upper end of the market, where growth is fastest and margins are fattest’ (Rachman, 1999: 111).

The most important international wine market is Western Europe, where 70% of the world’s wines are still made and consumed. Within this region, Britain is particularly important for premium wine exporters. Unlike the parochial market of France, where imports command less than 5% of premium wine consumption, Britain is the fourth largest wine market and world’s biggest importer of wine – and supermarket retailers are particularly prominent here. Supermarkets distribute over 60% of all wine consumed in the UK⁵. The main beneficiary of this trend has been Australia, which has pioneered the industrialisation of premium branded wine production. While France has traditionally had the biggest share of the British market, Australia’s share of the UK wine market has risen from 8% to 15% between 1993 and 1999, while 7 of the top selling wine brands in the UK in 2001 were Australian. In 2003, South Africa’s share of the UK market was just over 9%. Here sixty percent of all South African wine is sold by

⁴ The South African beverage industry distinguishes ‘good wine’ into ‘Standard Price’ (SP), ‘Medium Price’ (MP) and ‘High Price’ (HP) categories. SP wine is essentially good wine of the lowest quality - that sold at, or below production costs in the infamous *papsakke* (foil bags) and soft plastic bottles. MP wine is of slightly better quality and is often sold in two-litre box format, while HP wine is often broadly categorised as anything in a 750ml glass bottle and/or with a cork (Beverage Business Yearbook 2002:121-123). Increasingly, however, wine industry analysts follow Rabobank’s distinction of the wine market into ‘Basic’, ‘Premium’ ‘Super Premium’, ‘Ultra Premium’ and ‘Icon’ categories.

⁵ The situation is similar in the Netherlands, South Africa’s second most important market in Europe. In the USA 45% of all wine is sold in supermarkets. See Rachman (1999)

the supermarkets⁶. However, sales of South African wines are growing in other markets as well, especially the Netherlands, Germany, Scandinavia and the USA. This is reflected in record export figures which stood at 240 million litres in 2004.

1.5.2 Response of South African growers

South African growers responded to these trends by expanding their vineyards and by planting different varieties. By 2002, wine producers in South Africa had planted 107,998 hectares of land to wine grapes. This represented an increase of 17 per cent in the land used compared with 1992. Total production, on the other hand, decreased by only 5%, from an average of 851 million tons of grapes in 1991-1993, to an average of 806 million tons in 2000-2002 (Vink, Williams and Kirsten, 2004:240).

More important than lateral expansion, however, is the way in which growers have uprooted old varieties and planted new ones. Although the Chenin Blanc grape continues to dominate South African vineyards⁷, most of the new plantings involved the so-called 'noble' varieties, i.e. Cabernet Sauvignon, Merlot, Pinotage, Shiraz, Sauvignon Blanc and Chardonnay. In 2002, noble cultivars represented 40.5%⁸ of all plantings, compared to only 13.8% in 1991. In 1990, reds were only 15.5% of the total vineyard area; in 2002, this was up to 39%. Smaller, often experimental, areas of French, Spanish, Portuguese and Italian varieties are also broadening the scope of South African wines (Keevil, 2004:426-427). Replanting vineyards is not cheap. The average establishment costs involved are R 75,000 per hectare. From a farmer's point of view, re-plantings take priority above all else, including wages.

The new plantings are reflected in changes in relative prices. Prices for red wine sold in bulk have continued to increase, while those for white wine, including the noble varieties, have increased very little in nominal terms over recent years (Vink, Williams and Kirsten, 2004). According to a strategic study into the SA wine industry (Spies, 2000), the main challenge for the future is to create and sustain demand – especially abroad – for wines in the premium price category.

1.5.3 The cellar sector: concentration and diversification

Industry de- and re-regulation has also had an impact on 'players' further upstream. Political transition has removed the privileged status of the wine industry and farmers' lobbies. The measures that protected farmers from competitive pressures have been removed, and old alliances have been cracked by new opportunities and new markets. The wine grape commodity system is being restructured in complex and contradictory ways – with significant consequences for growers.

Firstly, traditional industry power relations are being reshaped by processes of globalization, deregulation and legislative change (Ewert, 2003). Moves to amend liquor legislation have signalled to the producing wholesalers that their competitive

⁶ WOSA Press release on UK figures, January 2003.

⁷ In 2002 they still represented 28.6% of all plantings. South African Wine Industry Statistics (SAWIS) (2003)

⁸ The percentage of new plantings might have been higher, were it not for conflicting signals coming from the market: in the mid- to late 1990s, relatively high prices for grape juice concentrate and distilling wine were sustained, lulling some co-op managers and farmers into a false sense of security and slowing down the shift to noble cultivars. Towards the end of the decade, distilling wine prices dropped, driven down by cheap imports.

stranglehold over retail would no longer be tolerated⁹ – while the increasing importance of local supermarket wine retailing is causing a rethink in ‘trade’ strategy anyway. Consolidation in the international drinks industry – particularly through the merger of Grandmet and Guinness to form the industry giant Diageo – has called into question many of the historic arrangements around distribution rights for international liquor brands.¹⁰ South Africa’s producing wholesalers, for many years the biggest fish in a very small pond, are themselves increasingly vulnerable to international and local competitive pressure.

Two distinct trends seem to be taking shape. On the one hand, there are clear moves toward concentration and integration (e.g. the merger of Distillers and Stellenbosch Farmers Winery to form Distell, South Africa’s second largest alcoholic beverage company, and the alliance between Stellenbosch Vineyards and Australian-based BRL Hardy). At the same time there is significant diversification, with an increase in the numbers of independent wine makers and cellars. Private cellars are proliferating. Their number increased from 105 in 1998, to 266 in 2003. Some of these numbers are the result of estates de-listing, in order to have more freedom in the sourcing of grapes. Others represent co-operative cellars that have transformed themselves into private companies.

Since 1998, indeed, the number of co-operatives has fallen from 69 to 50. Of those that have ‘disappeared’ two have gone bankrupt¹¹, while the others have undergone mergers and/or changed into companies. If the survivors want to escape the more pessimistic scenario, more may be forced to pool their resources¹². A recent study found that on average, co-ops only financed 22% of their assets with their own capital. Legal barriers aside, this makes them not very attractive to outside investors¹³.

The implications of these shifts are complex and uneven, but together they seem to signal an important shift in the power relations between growers, cellars and retailers. One particularly important development is the coming into being of a complex new internal market in both wine and grapes. With the development of new branded premium wines (e.g. ‘Arniston Bay’) that are not linked to particular vineyards, cellars that can produce premium wine according to desired specifications, have a wider range of possible buyers for their products than before. Similarly there is a much more dynamic market for wine grapes. A part of both these markets is driven simply by quality and price, but many brand owners, cellars and growers also tend to prefer entering into medium-term relationships in order to avoid uncertainty.¹⁴ Increasingly, staying in these relationships depends on the ability to produce grapes and/or wines that conform to precisely specified ‘quality’ and other standards.

⁹ ‘Hoe SA Brou vorder met sy nuwe fokus’, *Finansies & Tegniek*, 26 June 1998, p. 79.

¹⁰ ‘Bet your Glass is Dry’, *Financial Mail*, 15 December 2000, pp 30 – 32.

¹¹ The cellars (without the farms of the former members) were snapped up by private investors as a bargain.

¹² The marginal co-ops face a classical Catch-22 situation: if they don’t succeed in making the transition in time, the best farmers may leave to become private growers. If the latter leave in significant numbers, it becomes ever more difficult for the co-op to produce better wine and weather the storm. The situation is putting the solidarity of the membership under enormous strain. See Y. Chiffolleau et al, 2002.

¹³ South African co-op legislation does not allow non-farming shareholders.

¹⁴ Interviews with Distell staff, André Steyn 27.11.2001 and Ernst le Roux 11.12.2001

The result is a complex and shifting new strategic terrain. In 2000, co-operative cellars still sold more than 80% of their production in bulk on the domestic market. Less than 20% was sold directly to retailers in bottles or other containers. On average only 5% of production was exported. Increasingly, however, co-ops are doing their own marketing, either in the form of special marketers, separate marketing companies or both, steadily lessening their historical dependence on the domestic wholesalers.

1.5.4 Between the farmer and the state: the changing position of labour

Re-planting vineyards, modernising the cellar and improving the quality of their wine are not the only pressures faced by growers and producers. Since the coming into power of an ANC in 1994, a veritable slew of legislation has been passed, providing for a wide range of labour, social and land rights, ranging from basic conditions of employment in 1993, to the promulgation of minimum wages in 2003¹⁵. A paternalist state has stepped in to push back the paternalist authority of the farmer, and has created new limits to farmers' control over workers' lives.¹⁶ These changes seriously challenge the legal and formal underpinnings of traditional farm paternalism.

But challenging paternalism is not the same as replacing it. There is considerable evidence that many farmers are reluctant to comply with labour legislation, if not downright hostile to it (Kleinbooi and Hall, 2001). Most farmers may comply with the main provisions of the Basic Conditions of Employment Act (e.g. hours of work, leave and holiday provisions), but there is widespread reluctance to implement the Unemployment Insurance, the Employment Equity, and the Skills Development Acts (Sunde and Kleinbooi, 1999) and it remains to be seen whether enforcement of minimum wages is going to be any better than over the last ten years. Weaknesses in the legislation, a small inspectorate, huge caseloads and a shortage of CCMA commissioners compound the problem. Thus, though labour law has significantly disrupted the institutional order of paternalist labour management, it has not decisively transformed it. The state is far away and lacks the ability to enforce its own laws. Farm workers find that insisting on their rights can be a dangerous strategy, and know that maintaining patronage relationships may be as important. The result on the ground is a complex palimpsest in which labour relationships are simultaneously governed *both* by the formal codes of legislation *and* by the personal relationships and implicit contracts of paternalist practices (Flensted-Jensen, 2002).

This has important consequences for workers. Even in the relatively prosperous wine industry, many farmers are reacting angrily to the state's attempts to intervene in 'their' affairs. Minimum wages, in particular, caused huge protests in certain quarters of the

¹⁵ Sectoral Determination 8: Farm Worker Sector: the determination set two categories of minimum wages, viz. R 800 p.m. or R 4.10 per hour (for those working 27 hrs or less per week) in 'Areas A'; and R 650 p.m. or R 3.33 per hour in 'Areas B'. The determination came into effect on the 1st of March 2003. In March 2004 the rates were increased to R871.58 for area 'A' and R713.65 for area 'B'. Ten percent may be deducted by the farmer if worker housing complies with certain criteria and another ten percent if food is provided. All deductions must be listed on the worker's payslip.

¹⁶ Dismissals, for instance, are no longer simply a matter of farmers' prerogative. Statistics for the Commission for Conciliation, Mediation and Arbitration, Western Cape, show that of the 4,801 disputes heard by CCMA commissioners in Western Cape agriculture between November 1996 and October 2003, 67% were unfair dismissal disputes, followed by 'matters of mutual interest' (7,9%), 'unfair labour practices' (6,2%) and 'organisational rights' (3,5%). Statistics supplied by Anthea Edwards, CCMA head office, Johannesburg, 6 October 2003.

organized farming lobby.¹⁷ Formal protest is, however, not farmers' most significant response. Facing a sustained challenge to their power as employers and feeling increasing competitive pressures, many farmers seem to be opting for the one measure still within their power: restructuring their businesses. Many are resorting to casualisation, externalisation, contractualisation¹⁸ and mechanisation, deepening an already segmented labour market and further deepening the divide between 'winners' and 'losers'.¹⁹

The shrinking core of workers who manage to hold on to permanent employment, though often still living on the farm and caught in the web of paternalism, are on the whole net beneficiaries from these changes. Improved wages, higher levels of training and modernised management approaches are required, not only by labour legislation, but by the imperatives of survival in an increasingly competitive sector. Increasingly, their permanent status, improved skills, better pay, housing and other benefits set them apart from the seasonal, casual and contract workers: a rural *lumpenproletariat*, often residing in rural, peri-urban or metropolitan shanty towns.

1.5.5 Forces for change

Four further changes affect the prospects for equitable change, and the likely impact of interventions aimed at improving livelihoods on the ground, viz. trade unionism, farm worker share equity schemes (FWSES), institutional changes from within the industry itself and codes of practice.

Most obvious of these is the prospect of trade unionism shifting – or at least challenging – power relations between employers and workers. Again, legal change has had limited effects. Legal 'industrial' action on the part of farm workers first became a possibility with the passing of the 1994 Agricultural Labour Act; but unionisation in most parts of the rural Western Cape has been rather slow and piecemeal.²⁰

Part of the reason lies in farmer opposition; organised agriculture has vehemently resisted central bargaining, forcing unions to fight for recognition farm by farm. Here, unions are on unfavourable terrain: not only are resources stretched by distance,

¹⁷ *Die Burger*: 'Ommekeer beplan vir die wynbedryf', 14 May, 2003.

Die Burger: 'Minister moet nou besluit oor lone op plase', 25 April, 2003.

¹⁸ 'Casualisation' refers to a reduction in the size of the permanent labour force and often an inversion of the ratio of permanent to casual workers. 'Contractualisation' refers to re-employment under less favourable circumstances. Externalization refers to the rise of intermediaries like labour contractors and labour brokers.

¹⁹ In the 20th century the labour market in the Cape wine industry was always segmented in the sense of a division between permanent and seasonal labour.

²⁰ Precise figures are very hard to come by, given the fragile and fluctuating fortunes of unions in the wine sector. Most observers agree, however, that they do not exceed 10% of the permanent labour force (i.e. between 5000-6000 members). Two unions, The Food and Allied Workers Union (FAWU) and the National Union of Food, Wine and Beverage Workers of South Africa, claim a combined total of 3000 signed up members at the cellars of wholesalers represented by CWSI and KWV. Both these unions, plus SAPAAWU (S.A. Agricultural, Plantation & Allied Workers Union) and eight smaller unions claim to have members at private, estate and co-operative cellars and at farm level. However, no reliable figures are available. This also goes for the so-called 'Farm Workers Association'. Interestingly, the General Secretary of the Association is the former MD of the now defunct Rural Foundation, Ockie Bosman. They claim substantial support amongst farm workers, but do not sign up or register members. (Personal communication, Nosey Pieterse, 'labour' representative at the South African Wine and Brandy Company (SAWB), a newly established industry body charged with transforming the industry, 3 June, 2003.)

isolation and the poverty of their organisational base, but they are also up against the legacy of paternalist practice itself.

But that is not the whole story. Trade union strategies themselves may be ill-suited to agricultural organising. Farm workers can draw on significant traditions of resistance but these are very unlike the overt, adversarial, confrontational discourse of factory unionism. Rather, they rely on the ‘weapons of the weak’, operating within the framework of the paternalist moral universe itself, relying on individual appeals, consensual negotiations and the avoidance of the appearance of open conflict (Scott, 1985). The point is not simply that flirting with the unions – and becoming marked as a troublemaker – would seriously impair a worker’s re-employment prospects. It is also that prospects for union organisation remain slender as long as they tend to replace, rather than draw upon, the already existing cultural repertoire and traditions of farm workers’ resistance and agency.

While genuine worker representation is vital in the contestation of on-farm power relations, it is unlikely to be secured through the export to the farms of the Fordist models of trade union organisation developed in South Africa’s urban workplaces (Du Toit and Ewert, 2002). The focus of organisation needs to shift beyond the ranks of permanent, full-time, on-farm and mostly male workers, and greater priority has to be placed on organising the African and female workers who are so much more predominant in the seasonal and externalised labour force. Not only are these workers more vulnerable, but their priorities differ significantly and in gendered ways from those of permanent workers. In addition, as some of us argued (Du Toit and Ewert, 2002), it will be hard to organise these workers effectively if an artificial divide is made between their specifically farm-labour-related problems and all the other serious difficulties with rural service delivery and infrastructure provision that dwellers in rural informal settlements experience.

Much more ambiguous than trade unionism as a possible intervention into the power relations between workers and farmers, are farm worker share equity schemes (FWSES). These schemes, which involve various strategies for allowing workers to buy into ownership, very clearly do not represent a radical break with the traditions of the past; indeed, they bear many resemblances to the innovations of ‘neo-paternalist’ initiatives like the Rural Foundation and, in their emphasis on the convergence of the interests of management and workers, may be argued to involve a radicalisation or extension of some of the most fundamental elements of paternalist ideology. They can, however, bring significant benefits to farm workers in the longer run, and, to the extent that they turn management decision-making itself into a contested terrain, may contain significant opportunities for changing the highly authoritarian, racially hierarchical management practices of traditional paternalism. Ultimately however, they will tend to work mostly to the benefit of the small core of permanent on-farm workers, and even when they are so designed as to minimise differences between permanent and seasonal workers, their overall impact is likely to be the deepening of the division between the ‘insiders’ and the ‘outsiders’.

Perhaps most ill-defined of all, are the prospects for equitable change arising out of formal industry transformation. Here, a key question is the extent to which industry leadership can give the process any direction at all. In the years immediately after transformation, the KWV’s initial response to democratisation was to attempt to avoid

government's grasp simply by privatising itself (Williams and Vink, 1999). Since finally abandoning this course of action after two years of legal wrangling, it seems to have settled on trying to ensure that any changes happen on its terms. The South African Wine Industry Trust (SAWIT), set up by the KWV according to the terms of its out-of-court settlement with the then Minister of Land Affairs and Agriculture, has manifestly failed to implement its obligations to ensure the development and empowerment of farm workers Devco, the arm of SAWIT charged with supporting 'new farmers' and the upliftment of farm workers, has spent only a fraction of its funding and was, by March 2004, being accused of violating the trust's terms of reference.²¹

Meanwhile, the framework for debating change in the industry was set in '*Vision2020*', a 'strategic study' commissioned by Winetech in 1999. This resulted in the announcement in June 2000 of a 'strategic agenda' dominated by the need to 'achieve international competitiveness' and the imperative to 'shift to a ...market-driven industry', 'terroir-based production', 'total-value-chain management' and so forth. The document also contained the customary references to 'human development', 'social responsibility', 'affirmative action' and 'broadening the base of economic participation...'

Vision 2020 played a key ideological and political role, providing a legitimising framework for the continuation of processes of deregulation and restructuring that were already under way. In this it seems to have been moderately successful, if one credits its authors' insistence that there was widespread buy-in by co-operative cellar managements in 2000. As a *strategic* document however, it had significant limitations. It tended to avoid dealing at all with the trade-offs, costs, and choices involved in balancing the various imperatives it identified. Neither the 'Agenda' nor the reports that go with it provide any clue as to how economic participation is to be broadened or how rural livelihoods can be created and sustained.

These tensions and questions will become increasingly hard to avoid. In October 2002, the KWV created the South African Wine and Brandy Company (SAWB), a corporatist body with a council divided into four 'chambers' ('producers' i.e. growers, 'cellars', 'labour' and the 'trade'), but still heavily staffed by representatives of the old establishment. At a conference on Black Economic Empowerment²², in the South African Wine industry at the end of October 2003, it announced a 'Wine Industry Plan' (SAWB, 2003) based broadly on *V2020*, a plan accepted in principle by the Minister of Agriculture.

This set the scene for the development of a Black Economic Empowerment Charter for the Wine Industry. Quite aside from the cloud hanging over the heavily compromised SAWIT, any such charter faces the challenge of balancing and reconciling numerous

²¹ "Wine Equity Deal turns Sour" *Sunday Times* 29 February, 2004.

²² Broad-based black economic empowerment means the economic empowerment of all black people including women, workers, youth, people with disabilities and people living in rural areas through diverse but integrated socio-economic strategies that include, but are not limited to; increasing the number of black people that manage, own and control enterprises and productive assets; facilitating ownership and management of enterprises and productive assets by communities, workers, cooperatives and other collective enterprises; human resource and skills development; achieving equitable representation in all occupational categories and levels in the workforce; preferential procurement; and investment in enterprises that are owned or managed by black people. Broad Based Black Economic Empowerment Act. No 53, 2003. Government Gazette RSA, Vol. 463, 9 January 2004. No 25899.

different agendas – not least, the very different models of what ‘Black Economic Empowerment’ could be. The expectations of middle-class black South Africans hoping to buy into opportunities to share the profits of the industry will have to be balanced against the demands of those arguing that workers should be included in broad-based empowerment. With land ownership being among the least attractive segments of the value chain to buy into, it is likely that most of the 4,500 or so wine farms in the industry will remain in white hands for some time to come.

In the meantime, and perhaps for the reasons mentioned, the first empowerment deal was struck at the commanding heights of the industry. In July 2004 it was announced that a broad-based, black consortium had acquired 25.1% of the shares in KWV. Although hailed as a milestone by some, numerous questions have been asked about the deal, not least who the real beneficiaries are. Whether this represents the first step towards ‘broad-based empowerment’ in the South African wine industry, or the enrichment of a new black elite, is too early to say.

Given the limitations of trade unionism, equity share schemes and so forth, what impact, if any, can codes of practice have on the lives of the poor and powerless in the rural Western Cape?

For one, codes are very new. They only arrived in the Cape wine industry in 1998. Towards the end of that year, the London based Ethical Trading Initiative (ETI) put out the first feelers and managed to get six local cellars on board for its ‘wine pilot’. Four of these were private cellars/estates and the other two co-operative wineries (ETI, 2004: 14). The latter had over 50 and 220 members respectively. Participation was voluntary and not linked to any commercial pressure. In 2002, a private cellar in Paarl chose to go a separate route adopted the SA8000 code²³.

The pilot stretched over three years (1998-2001). A direct spin off of the pilot was the establishment of the Wine Industry Ethical Trade Association (WIETA) in November 2002. WIETA is a voluntary association of diverse stakeholders in the South African wine industry whose ultimate goal is to improve the conditions of workers in the wine industry. The WIETA code is based upon the ETI base code and South African legislation, but provides greater detail on the principles most applicable to the South African wine industry. It now has 77 members, among which are two UK retailers, some high profile producers in SA and a few of the bigger co-operative cellars²⁴. By October 2004, 35 firms had been audited, and 6 had been accredited.

No doubt the mere roll out of the code could be seen as proof that the organisation is having an impact. However, in a report published in 2004, ETI goes a step a further. Couched in rather careful language it suggests that ‘...[s]ome changes are directly attributable to the project, others might have happened anyway, but were accelerated by the closer scrutiny the pilot afforded’.

²³ The two codes are identical, except for WIETA code provision no.10, which provides for ‘Housing and tenure security’ – an issue of high importance for South Africa farm workers where on-farm tenure is as old as the industry itself (see Annex 1). Also SA8000, unlike ETI, requires third party inspection re compliance.

²⁴ Five members of WIETA are part of this study. It includes the cellar which had previously adopted SA8000, but switched to WIETA recently.

The report also suggests that ‘...the project fostered an atmosphere of social dialogue and change and brought people together in a new way’ (ETI, 2004:55).

More specifically, the report claims that ‘...over the three years significant changes and improvements were achieved...as a result of [the farms] engaging in this project’. For example:

- ‘The project stimulated significant improvements in health and safety...[a]fter discussion with workers the incident of subsidised wine was stopped...’
- ‘Where workers did not have formal written contracts these were put in place..’
- ‘Child labour was tightened up, ensuring that work was actively managed within the law...’
- ‘Housing was upgraded’.
- ‘We made some inroads into discrimination against women.’
- ‘On wages and benefits we ensured that legally required social security contributions such as UIF were paid where they had been lacking.’
- ‘Attitudes to social dialogue changed as the project progressed, with greater willingness to discuss labour practice with all stakeholders.’
- ‘Inspection teams noted in several cases...greater transparency in management processes...’ (ETI, 2004: 56-57).

2. STAKEHOLDERS IN THE SOUTH AFRICAN WINE INDUSTRY

2.1. Farmers

There are 4,300 growers in the South African wine industry. More than half of these (i.e. 2,306) are fairly small, producing not more than a 100 tons per year. The majority of these (approximately 3,800) belong to co-operatives. In addition to grapes, most of them also grow wheat, fruit or vegetables on their farm.

It would be fair to say that most co-operative farmers have found it difficult to adapt to the new era. Unfamiliar with the markets, under financial pressure to transform their vineyards and subject to labour laws, many of them feel beleaguered and are not very sympathetic to codes of practice. Compared to the previous era, co-op farmers have hardly any political clout left. Not only have they lost the direct connection to government and the protection offered by regulation, but they no longer have an organisational voice of their own. Together with private cellars and estates, they now form one of the four ‘chambers’ at the South African Wine and Brandy Company (SAWB).

Generally speaking, the owners of private cellars and estates are less resistant to change, because of their entrepreneurial and enterprising outlook. Often these are people with a business background and they manage their farms as such. This may mean a businesslike (i.e. non-paternalist) approach to labour and the adoption of codes if the markets so require. Although these two types of cellars produce only some 30% of the wine, they have a bigger proportion of the ‘noble’ varieties on their farms.

2.2. Cellars

Towards the end of 2004 there were some 388 cellars in South Africa. A notable feature of the industry in recent years has been the rapid growth in the number of private cellars. Co-ops on the other hand are on the decline. Although the South African Wine Industry Statistics body (SAWIS) still lists 67 co-operatives, in reality there are only 50 or so left, after mergers, bankruptcies and conversion to companies. However, the remaining co-ops still produce approximately 70% of the total volume of wine. Most of this is still sold in bulk to wholesalers, agents or retailers. Comparatively little is sold in bottled form under their own label, directly to the retail sector. Many of the co-operatives still lack a sufficiently strong market orientation. In the second half of 2004 the result was a record 'surplus' for which no buyers could be found. This aggravates a situation in which, on average, 78% of co-op assets are financed with borrowed capital.

Private cellars and estates command a bigger share of the 'quality' wine in the industry. Because they are commercially more successful, they are not nearly as financially squeezed as the co-operatives. All things being equal, this makes them more open to 'corporate social responsibility' (CSR).

2.3. Wholesalers

In 2004, there were 65 wholesalers in the South African wine industry, of which 9 were producing wholesalers (Vink, Williams and Kirtsen, 2004). This sector is characterised by a high degree of concentration. The biggest 'players' are KWV and Distell. The latter came into existence after a merger between Stellenbosch Farmers' Winery (SFW) and Distillers a few years ago. KWV owns a large number of shares in Distell. However, the power of wholesalers has actually weakened vis-à-vis growers and cellars, mainly because after deregulation, the opening of world markets and amendments to liquor legislation, the market for grapes and wine has become much more open and competitive. The wholesalers are organised into the Cape Wine and Spirits Institute (CWSI). The wholesalers, also known as 'the trade', are represented in one of the chambers at the SAWB.

2.4. Labour

It is estimated that between 50,000 and 55,000 workers are permanently employed on wine farms. During the grape harvest these are supplemented by approximately the same number of casual workers. More are employed at various other stages in the annual 'grape cycle' (e.g. during pruning). If dependents are added to these different categories of workers, it is clear that the wine industry supports a considerable number of livelihoods – primarily in the Western Cape.

Although no exact numbers are available, researchers agree that the core of permanent, on-farm workers is getting smaller, while the sector of non-permanent labour is on the increase. This has come about mainly as a response by farmers to two developments: firstly, cost cutting measures and secondly, the state's attempt to provide more security of tenure to farm workers. As indicated in the previous section, there is a deepening divide between these two sectors of the labour market.

Without doubt, permanent workers in the wine industry find themselves in a better position than prior to 1994, even though enforcement of the law remains a problem. Also, not more than ten per cent of workers are organised into unions. The two most

prominent unions in the industry are FAWU (Food and Allied Workers Union) and NUFBSAW (National Union of Food, Beverage, Spirits and Allied Workers). However, they only have a presence at the bigger wine farms and cellars. They have hardly a foothold at the hundreds of smaller farms and wineries in the rural Western Cape.

Organised or not, given the high unemployment in the region, both permanent and casual workers have an interest in the expansion of the wine industry.

2.5. Institutions

SAWB (South African Wine and Brandy Company)

As mentioned above, the principal task of the SAWB is to facilitate the transformation of the industry, and especially 'empowerment'. This would appear to be uncontroversial, but is not. On the one hand the body is being accused of occupying itself with too much 'high politics' (i.e. the KWV empowerment deal, page 12 above), but achieving too little 'on the ground'. On the other, there are indications that the 'labour'²⁵ chamber is not satisfied with the current structure of the SAWB and wants more power. To what extent this power struggle is putting brakes on the body, is not clear.

SAWIT (South African Wine Industry Trust)

Born out of a compromise between the erstwhile Minister of Land Affairs and the KWV, SAWIT was given the brief to assist in the 'development' of the historically disadvantaged farm worker community. So far it has not made a huge difference and recently it has been the subject of yet more controversy. A substantial portion of its funds was used to help finance the KWV empowerment deal. Some question whether farm workers are going to be the real beneficiaries.

WOSA (Wines of South Africa)

WOSA has the task is to market South African wine abroad. It can take some of the credit for what is undoubtedly a remarkable export performance over the last ten years (i.e. 208 million litres in 2002, compared to 23 million in 1991). Exports continue to increase, despite a strengthening Rand and setbacks like 9/11.

By its very nature WOSA has no interest in any bad publicity coming out of South Africa or the industry itself. That is why a scandal like the use of prohibited flavouring agents in Sauvignon Blanc by the KWV does not sit well with WOSA staff. It is for the same reasons that WOSA has been a strong supporter of WIETA (Wine Industry Ethical Trade Association). Not only is WOSA's chief executive, Sue Birch, one of the trustees, but she has also been instrumental in channelling some of the EU excise duties towards the financing of WIETA²⁶. Improving the position of farm workers in the industry would clearly make WOSA's job easier, given the industry's infamous labour history.

²⁵ Many question whether those occupying the 'labour' chamber of the SAWB do indeed represent labour. The principal person in this regard wears at least three hats: one as an ex-union organizer, another one for BAWSI (Black Association for the Wine and Spirits Industry) and a third one as a director of a black-owned wine company.

²⁶ In terms of the EU-SA trade agreement concluded in 1999, EU importers do not have to pay excise duties on a total of 42 million litres p.a. for a number of years. The UK importers agreed to donate the monies thus saved for the promotion of SA wines in UK supermarkets and for 'social development' in the SA wine industry. It is some of the latter that helps to finance WIETA. The Dutch retailers refused to follow suit.

WIETA (Wine Industry Ethical Trade Association)

WIETA was launched after the ETI's South African 'wine pilot' came to a close. After a rather slow start, it has managed to gain momentum. It now has 77 members, among which are two UK retailers (i.e. Tesco and the Co-op), some high profile producers in South Africa and a few of the bigger co-operative cellars. By October 2004, 35 firms had been audited. However, to put things into perspective, only six companies have been accredited so far (i.e. comply with WIETA's standards). Also, it has not managed to pursue any South African retailers, very few non-exporters and no labour brokers. By the end of 2004, none of the local supermarket chains had joined, although the Spar chain had indicated that they were considering doing so. Woolworth, probably the most 'quality conscious' of all South African retailers, first wanted to assess the WIETA audit methods before taking a decision²⁷

The fact that so far only a handful of exporters have joined WIETA, would suggest that it is not absolutely necessary to adopt the WIETA or any other code of practice in order to gain entry to foreign markets.

This is not the only obstacle that is holding back WIETA. Another is the complaint of 'code overload' and disagreement on who should monitor 'social improvement' on wine farms. Some support WIETA, but others think it should be the job of the SAWB, for instance. In other words, in the minds of farmers and other stakeholders, WIETA has to compete for credibility and support.

3. PROJECT PURPOSE, OBJECTIVES AND METHODOLOGY

3.1. Purpose

The objective of this study was formulated as: '*to carry out a systematic analysis of the lasting or significant changes – positive or negative, intended or not – in people's lives brought about by the adoption of ethical or labour codes of practice in African export agriculture industries*', in this case, the South African wine industry.

Three broad areas of change were identified in relation to worker conditions, well-being and empowerment which were considered to relate to the provisions of ethical and labour codes of practice:

- *Material wealth* and assets – land, housing, income, credit and savings, wages, occupational status etc.
- *Social well-being or human capital measures* - worker social well being, health and education.
- *Worker empowerment or political capital* - participation in decision-making, awareness of rights.

In order to assess the impact, the approach involved a multiple methodology, combining quantitative and qualitative methods (see next section). These were to be applied not only to workers and worker households, but also to company management and 'key social groups' at adopting and non-adopting companies. The resultant data was to be analysed against the backdrop of a contextual analysis of the wine industry and South African society at large.

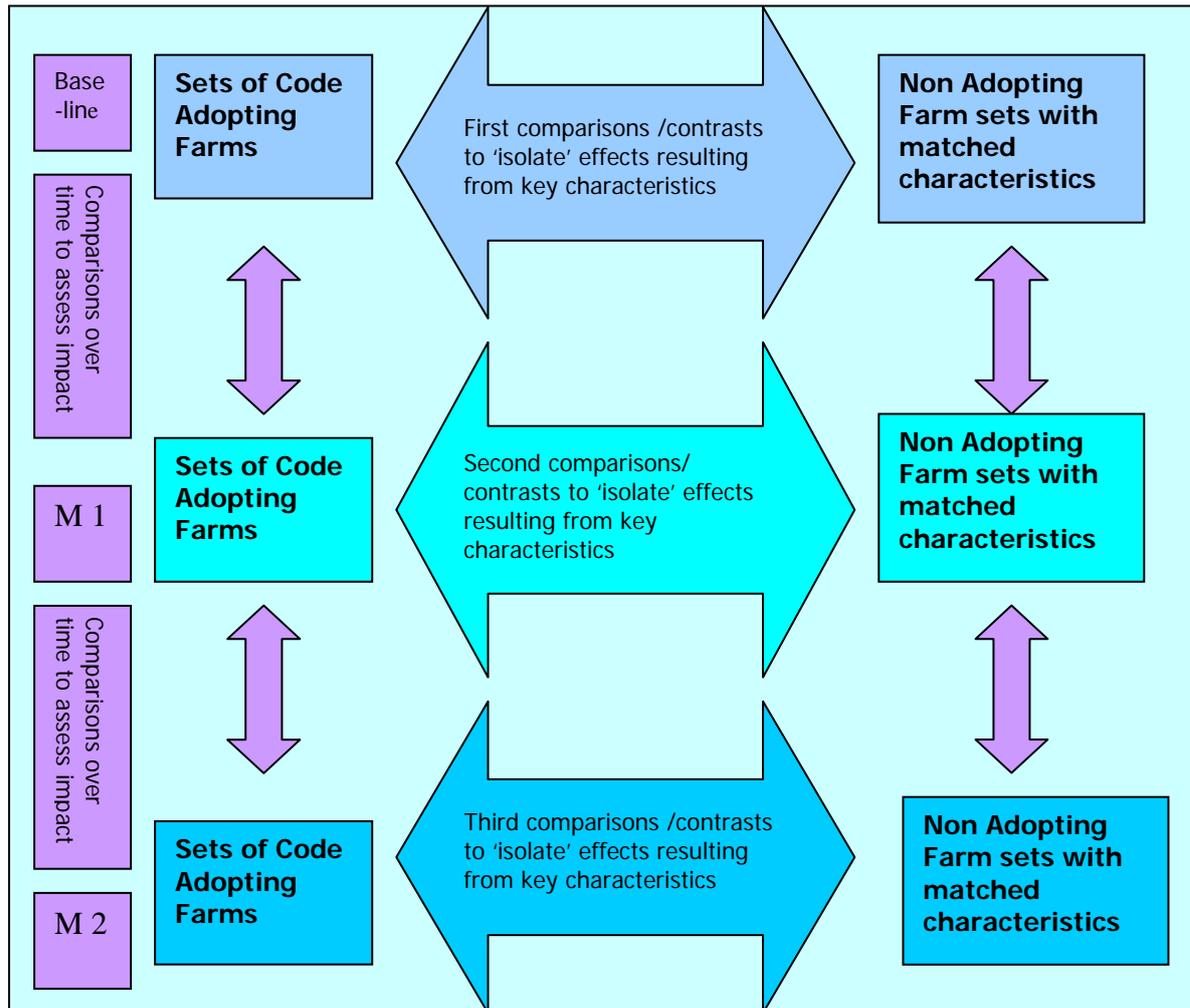
²⁷ Annual report, CEO of WIETA, 7 December 2004.

3.2. Methodology

3.1.1 Overview

The central comparison employed for this impact assessment was that between the conditions and position of workers at similar *code adopting companies and non-code adopting companies*. These were tracked over time, providing a ‘double comparison i.e. the difference in worker conditions between code adopting and non-code adopting companies and the changing difference over time (see figure 2).

Figure 2: Study Comparisons



M1 – 1st Monitoring Round. M2 - 2nd Monitoring round

The project got off the ground with a team workshop held in January 2002. The aim was to plan the participatory phase of the project, the primary objective of which was the identification of impact indicators. Focus groups were initially used as a participatory method to explore impact indicators. However, although focus groups were split on the basis of gender and work status (i.e. permanent and casual), the team realised that some workers would articulate their needs and concerns more freely in a situation of privacy and confidentiality and hence supplemented the focus groups with individual interviews. Using these two methods the team visited six farms in three different regions of the wine lands. These were followed up with more focus groups and interviews with seasonal (i.e. harvest) workers in March of the same year.

At the end of this phase it became clear that different workers had somewhat different priorities (see Annex 2). While there was a great deal of overlap in the long list of needs articulated by all groups, there were differences in the way in which they were ranked. For instance, while higher wages were common to all groups, (not surprisingly) job security ranked at the top of the list generated by casual workers. The questionnaires which were eventually used for both categories of workers during the baseline study and the monitoring cycles, tried to capture the needs and priorities of both groups (Annex 4).

Equally importantly, the participatory phase highlighted priorities on the part of workers for which the codes (i.e. ETI and SA8000) do not provide. For instance, workers emphasised;

- Sustained opportunities for training
- information on company performance
- consultation in decision making
- better health care for the family
- better day care for children
- employer support for children's education
- alcohol abuse and domestic violence

This was a significant discovery, because it meant that the codes were not aiming at some of the things that matter to farm workers in the Cape. However, our approach to impact assessment required that workers priorities should be incorporated into the methodology in order to chart changes relevant to workers. Hence they were addressed in the worker questionnaire. The first draft was used during interviews with both permanent and casual workers in the autumn and winter of 2002. This generated the first, and as it turned out, partial set of *baseline* data.

As part of the first round of farm visits and interviews, we also spoke to either the owner or the manager at each of the first ten farms (i.e. five adopters and five non-adopters). A questionnaire was used as the basis for the interview. The interviews addressed a number of themes, ranging from production and sales data to strategic questions and the training of workers. A core component of the schedule were a number of questions that tried to assess changes in working conditions and labour relations on the farm since the mid-1990s (marking the onset of the extension of labour rights to farm workers in South Africa). In the case of adopting companies, the questions additionally tried to capture changes *before* and *after* the adoption of the code.

Given the possibility of some non-adopting companies turning adopters in the course of the study, it was decided to extend the baseline study by an additional ten non adopting companies of different status in the five major grape growing regions. Additional worker and owner/manager interviews were done in the second half of 2002.

The final baseline study included a total of 226 worker (see Table 1) and twenty manager interviews. However, there were two problems: one, as a result of the resistance of the employers to any kind of research during the grape harvest (February, March and, partly, April), it was not possible for the research team to interview any seasonal workers; two, because of unfortunate timing we only managed to interview seven casual workers at non-adopting companies. This number was too small for meaningful statistical comparison. As a result we decided to exclude all 66 casual

workers from the 2002 baseline data. In the statistical comparisons below, the 2002 baseline data only includes permanent workers. Instead our baseline data for casual workers was derived from interviews with 41 seasonal workers early in 2003.

The first monitoring cycle of permanent workers was done in mid-2003 and included a total of 106 interviews. This was followed by 75 interviews during the second monitoring cycle in 2004. The one and only monitoring cycle for casual workers was done in February-April 2004. It comprised 39 interviews.

The respective sample sizes at the different stages of the project are reflected in Table 2.

Table 2: Project stages and sample sizes

Stage	Employment status	Adopting farms	Non-adopting farms	Total
Baseline survey 2002	Permanents	59	101	160
	Casuals	59	7	66
1 st monitoring cycle 2003	Permanents	33	57	90
2 nd monitoring cycle 2004	Permanents	21	40	61
1 st monitoring cycle 2003	Casuals	21	20	41
2 nd monitoring cycle 2004	Casuals	22	17	39
TOTAL				457

Over the three years a total number of 457 worker interviews were conducted. Although minor changes were made to the worker questionnaires between monitoring cycles, they did not deviate from the central focus on workers' priority areas as articulated in the early stages of the study. The average duration of the worker interviews was 30 minutes.

Late in 2004, the first round of manager interviews was followed up with a second one. The second interview was less wide ranging. It mainly tried to find out how codes were managed at the farm level (in the case of adopters) and what the impact had been so far. From non-adopters we wanted to know whether codes had 'touched' the company in one way or the other since our first visit in 2002.

By the end of 2004 we had managed to complete the monitoring cycles. However, this was only after we had overcome a number of obstacles (see 'Limitations' below).

3.1.2 Selection of companies

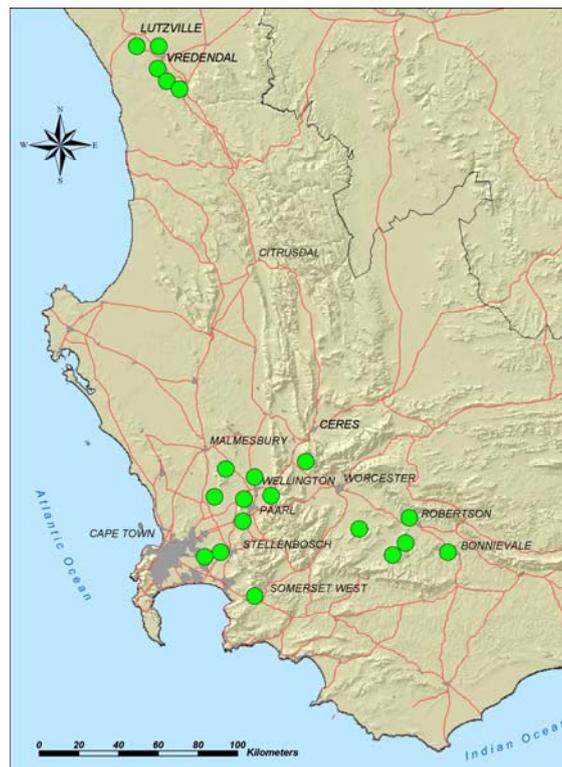
Of the original six companies involved in the ETI pilot, three decided to participate. So did the cellar in Paarl which had adopted SA8000. The four adopting companies consisted of three private cellars and two hybrids, i.e. partly co-op farm and partly private cellar. Both of these were selling the bulk of their grapes to the co-operative, but had started their own little private cellar on the side. One of these had qualified as an 'adopting company' by virtue of the fact that the co-op had signed up to ETI, and the other because it acted as a supplier of grapes to the company that had endorsed

SA8000²⁸. The latter code requires all suppliers to comply with the code adopted by the buyer of the grapes.

When trying to match these adopters with five non-adopters, the most important variable was cellar status, i.e. private cellar/estate or co-operative. If the adopter group consisted of three private cellars and two co-op farms, it was important to match this with the same kind of ‘mix, because there are important differences between the two. Historically private cellars have a much more entrepreneurial culture than co-ops. Also they are directly confronted by the market. Even today, most co-operatives have an indirect relation with the market, i.e. mediated by the wholesaler and other agents. As a result they are more sheltered from the quality and ethical demands emerging from the markets.

Region is another important factor in the SAWI, because of different production and social histories. This meant that we had to find matching farms/cellars in the three regions where the five adopting companies were located (i.e. Stellenbosch-Paarl, Robertson and Olifantsriver).

Map 1 Major wine growing areas of the Western Cape.



However, because of refusals to participate, our attempt to match the five adopters with five non-adopters was not quite ideal (see Table 3).

²⁸ By mid-2004 the supplier company had resigned from the co-op. It now vinifies most its grapes on the farm, but has continued to sell grapes to the client. At the same time, the latter has switched from SA8000 to WIETA.

Table 3: Company sample by region and status before extended baseline survey

Region	Private cellar/estate		Co-operative farm	
	Adopting N	Non-adopting N	Adopting N	Non-adopting N
Stellenbosch	1	1		
Paarl	2			2
Robertson	1	1		
Olifantsriver			1	1
TOTAL	4	2	1	3

The extra ten non-adopters to be included in the baseline were sampled from a complete list of cellars (co-operative, private and estates) supplied by SAWIS (South African Wine Industry Statistics). It was decided to draw the sample from those areas of the South African wine industry in which the majority of growers are located (i.e. Stellenbosch, Paarl, Worcester, Robertson and Olifantsriver). In order to test the representativeness of the 15 non-adopting companies, quantitative data from the manager interviews were compared with the same kind of data from a postal survey of grape growers in the Cape wine industry. A random sample of 33% was drawn from SAWIS' complete list of "grape growers" spread over all official wine areas. Of the 1439 questionnaires sent out, 245 were returned, completed by either the owner or the manager. Statistical tests were run to test for the "independence" of two sets of quantitative data: the one provided by the 15 "non-adopting managers" and data supplied by producers through the postal questionnaire. The conclusion was that there were no significant differences between the two samples on basically all variables.

At this stage of the study we were under the impression that our sample of farms included only five code adopters. During the initial management interviews at two Olifantsriver farms in 2002, we were led to believe that they were private cellars. However, during the first monitoring cycle in 2003 we discovered that they were private cellars *only in part*. It turned out that they actually delivered the bulk of their grapes to the code adopting co-operative in that region. Instead of two, we now had four farms belonging to the same code adopting co-operative. This was 'matched' by only one non-adopting co-op farm – clearly an imbalance. After these discoveries we were left with 8 adopting and 12 non-adopting companies.

Table 4: Farms remaining for comparative analysis at the end of 2004

Region	Private cellar/estate		Co-operative farm		Partly co-op farm and partly private cellar Adopting
	Adopting N	Non-adopting N	Adopting N	Non-adopting N	
Stellenbosch		2		1	
Paarl	3			3	
Worcester		1		1	
Robertson	1	2		1	
Olifantsriver			1	1	3
TOTAL	4	5	1	7	3

At the beginning of 2004 one of the non-adopting co-operative farms changed owners and dropped out of the study. This reduced them to 11.

For the purpose of statistical analysis we also decided to exclude three (of the four) adopting co-op farms from the Olifantsriver region because it would have given too

much weight to that area in the total sample of 11 non-adopters. Olifantsriver has a less liberal labour history and ‘loading’ the non-adopters with four co-op farms from that region, would have skewed the picture. So, in the statistical analysis we compare the following:

Table 5: Companies included in the statistical analysis

	Co-operatives	Private cellars/ estates	Partly co-op farm, partly private cellar	TOTAL
Adopting companies		4	1	5
Non-adopting companies	6	5		11

The table suggests that the category of ‘adopters’ does not include a co-operative farm. However, this is misleading. The ‘partly co-op farm, partly private cellar’, actually delivers more than 90% of its grapes to the co-operative. The wine bottled on the farm itself contributes a tiny amount to the turnover. For all practical purposes it is a co-operative farm and in the statistical analysis below we treat it as such. So, the final sample looks as follows:

Table 6: Final sample of companies included in the statistical analysis

	Co-operatives	Private cellars/ estates	TOTAL
Adopting companies	1	4	5
Non-adopting companies	6	5	11

3.1.3 Data Collection

Once access to farms had been secured, interviewing workers was generally unproblematic. However, at six of the farms it proved rather difficult – either because of distrust or the bureaucratic nature of the business.

Interviewing seasonal workers was not easy. Understandably farmers were not keen to sacrifice production during this crucial time of the year and the workers themselves just wanted to get home after a long day.

At both adopting and non-adopting companies we did a total of 12 household case studies. Recognising that it was not possible to take an intensive participant observation approach, a compromise position of carrying out three visits to the selected households over the duration of the study was adopted. However, although people welcomed us into their homes, by the time of the second some of them felt there was no point in going through a lengthy interview again when so little had changed in their lives since the first visit. Hence it was decided to drop plans for a third visit.

3.1.4 Sampling

At the start of the project we did not have a free hand in the sampling of workers. It was hard enough to get the participation of the companies for a three-year project. Under the circumstances we felt that we could not insist on the disclosure of full personnel data from which we could sample according to the ‘textbook’. It was not only the delicate nature of the negotiations. Most visits to the farm had to be done during working hours and workers had to be taken out of production for the duration of the interview. Given that the company was already making this sacrifice, we felt that we could not make any further demands. We did, however, ask the contact person to sample at random from

their staff list. We were given a statistical staff profile, however, and on this basis we were satisfied that the baseline sample was sufficiently representative.

On monitoring visits to the farms the ideal would have been to speak to the same ‘panel’ of workers - be it permanent or casual – included in the baseline study. Although we succeeded in maintaining a core of workers on each farm over the research period, the composition of the sample changed as a result of staff turnover, retrenchments, and natural attrition. In cases where workers were no longer in the employ of the farm, we asked the manager to replace them with workers of the same gender and job category. The task was even more difficult in the case of casual workers. By its very nature seasonal labour is fluctuating. As a result we managed to speak to very few casual workers for a second time.

After the first monitoring cycle of permanent workers we discovered that the range of worker responses did not vary drastically. As a result we had the confidence to maintain proportional sampling, but to systematically reduce the number of interviews with permanent workers over the years.²⁹

3.1.5 Limitations

In a politically sensitive research context like the South African wine industry the most difficult obstacle is access³⁰. That is the main reason why we did not succeed in finding a perfect match between adopters and non-adopters in each region. We were met by a number of refusals before we eventually got the twenty farms on board.

As mentioned above, practical problems also constrained our sampling of workers.

Lastly, one would have liked to get the views of more stakeholders groups, e.g. ‘new farmers’ in the wine industry. However, they are few and far between and scattered over a wide area. Resource constraints made this well nigh impossible. Where they have made their voices heard, they have described codes of practice as a cost factor that impedes their survival and competitiveness³¹.

4. ASSESSING THE IMPACT OF CODES OF PRACTICE

4.1. The industry

ETI can justifiably claim to have introduced the notion of ‘ethical trade’ into the discourse of the Cape wine industry. Between the early 1980s and the early 1990s the discussion regarding labour on Cape wine farms was conducted in the name of ‘upliftment’. With the advent of deregulation, the demise of the Rural Foundation and the transition to democracy, the internal discussion around this issue virtually stopped. All change became legislation driven and for farmers and cellars the issue became one of compliance with local labour law.

²⁹ The other reason was cost. Over the duration of the study the Rand strengthened vis-a-vis the Pound (40% by mid-2004).

³⁰ Other challenges are discussed in a paper. See Nelson, Martin and Ewert (2002).

³¹ This view was articulated by one new farmer at a report back meeting of a research team under the leadership of Stephanie Barrientos (IDS, Sussex) which looks at the impact of ETI in a number of countries, including horticulture in South Africa. Stellenbosch, October 2004.

For the first time the ETI ‘wine pilot’ brought to the attention of local exporters what overseas buyers might expect in terms of social, health and environmental standards. Although the ETI’s base code did not exceed local labour law, it neatly summarised the minimum standards required by overseas clients. It did not matter that only a minority of overseas agents articulated these demands. What was important was the fact British supermarkets articulated this request. After all they were the biggest players in what had already emerged as most important market for South African wine. While well-meaning farmers and cellars tried to find their way through a plethora of new labour legislation, often aided by labour lawyers, the codes of practice focused attention in a very economical way on the things that really mattered, e.g. no child labour, freedom of association etc.

After initial resistance and resentment against what was perceived by some as ‘meddling in our affairs’ by overseas clients, or even protectionism emanating from the EU, the idea of minimum labour, health and environmental standards gained ground and became ‘normalised’, i.e. not something strange and foreign, but a baseline for a positive human development agenda.

While it would be wrong to claim a direct causal connection, the normalisation of the notion of minimum standards has probably helped to facilitate the adoption of similar ‘codes of conduct’ by some of the important stakeholders in the industry, e.g. Agri Western Cape (i.e. farmers association) and the ‘score card’ approach of the SAWB.

Ironically, the proliferation of codes has resulted in the feeling of ‘code overload’ in some quarters of the industry. Although WIETA has managed to notch up 77 members in a matter of two years, faster growth is probably hindered by confusion and irritation on the part of farmers, cellars and other firms along the value chain.

4.2. The companies

4.2.1 Code Adopters (5)

Four of the adopting farms in our sample were private cellars, while the other one was a co-operative farm (profiles of participating farms are given in annex 3). However, one of the former was mainly a co-operative farm for the greatest part of the research period. Whilst the co-op cellar itself was a non-adopter, the farm also supplied grapes to the SA8000 adopter in our sample. As a result it was expected to comply with the SA8000 code. The farm recently resigned from the co-op and is now a private cellar. However, because of its connection with the co-op over most of the research period, we treat it as a co-op farm in our analysis.

Three of the farms are managed by the owners themselves, while the other two are run by a management team.

In only two cases are grapes/wine responsible for 100% of the turnover. The other three rely on mixed farming or wine and secondary agriculture. In one case this is crucial, because the cucumber operation greatly subsidises the transformation of the vineyards.

All five adopters are inserted into the export sector. On average the five cellars export (directly) 81% of their production. The major share of exports goes to the UK and

European markets. The three private cellars deal directly with overseas buyers. In the case of the co-op farms, this is done by cellar management.

Two of the private cellars were part of the ETI pilot, while the other one adopted SA8000. By virtue of the fact that it supplied grapes to the latter, the fourth company was expected to implement SA8000. The fifth adopter is a member of the co-operative which also pioneered the ETI code.

It is clear from the histories of the three private cellars that they adopted the code because they were *already socially responsible* in orientation and practice, and not the other way round, i.e. they did not become socially responsible in the wake of adopting the code. All three introduced social development programmes in the early or late 1990s (but before 1998). These included pre-school and other educational projects, training programmes, housing projects, a community property association (in one case) and equity share projects at two companies. Compliance with new labour legislation was a matter of course. At one of the three companies an agreement with a union had been entered into. All three had a system of worker representation in place.

Although worker representatives were briefed about the codes at the beginning of their introduction, there is no evidence to suggest that knowledge and awareness of the codes were regularly reinforced by management over the research period. Initial visits by supermarket inspectors were followed up in the early years, but it was not a case of base standards being prominently displayed in the workplace and workers being reminded regularly of what they stood for. It therefore comes as no surprise that none of the workers at these companies could elaborate on the codes beyond the knowledge that 'the overseas supermarkets want that we are being treated fairly'. In fact, even at this level the general awareness was lower amongst workers at adopting than at non-adopting companies! (see comparison below).

However, capacity seems to have been built amongst the worker representatives. For example, one manager said that the introduction of the code 'changed the relationship between the worker representatives and management' and that it gave the latter 'more confidence when interacting with the auditors'.

Although the codes presented no real challenge to these three companies, management had mainly positive things to say about them. According to the manager at the SA8000 company, the code 'opened their eyes to health and safety issues' and prompted them to put a management system in place so as not to manage 'standards' in an ad hoc fashion³². After that 'there was less ambiguity on the part of managers and workers – we had a clear set of norms and standards'. The only negative aspect were the relatively high costs involved in hosting the third party auditors every six months (R 35 000). It is for this reason that the company recently switched to the WIETA code.

Some of these positive aspects were echoed by the other two private cellars. One of the managers said that the ETI pilot prompted a system of 'record keeping' and that it had made them 'more acutely aware of the minimum wage'. On the negative side the HR manager at one of these cellars said that the ETI code presented no challenge and 'no

³² This is consistent with the findings of Collinson, 2002, that codes encourage clearer management systems for recording information and reporting.

dynamic vision of development'. For this reason they were still in two minds about becoming a member of WIETA, although there was pressure from their London marketing office to do so.

The response to the codes at the two co-operative farms was quite different. Neither signed up on its own initiative. In one case the farm had to, because it acted as a supplier to the SA8000 adopter and at the other, the co-op management, under 'moral pressure' from a British supermarket, decided that there was no other option.

In the former case the owners were not well informed on the code. According to the manager at the SA8000 farm, 'the supplier did not respond too well' and 'there was little improvement'. Our visits to the farm confirmed this; relationships with the casual harvest workers were especially tense. Housing was in a poor condition and they never got the chance to read their contracts. Part of their wages was held back until the end of the harvest. This arrangement clearly came down to 'forced labour' – something that contravenes the code.

In the case of the co-operative cellar, management confessed that at the early cellar meeting when the ETI pilot was first discussed, there was opposition from a considerable part of the membership (total today: 223). When the issue was first raised, the cellar management told the membership that the adoption of the ETI code was a 'pre-condition for a supermarket listing'. After the code was adopted the cellar embarked on a programme of improvements: written contracts were put in place, working hours reduced, the 'tot system' (payment in alcohol) was abolished, special storage rooms for pesticides installed and housing upgraded³³. This had all 'cost money, but was worth the commercial promise'. Although there was opposition at the beginning of the process, the cellar now had 'an advantage over other co-operatives in adapting to the new South Africa'. Commercial success seems to vindicate the strategic decision. Today the cellar has two among the twenty top selling brands in the UK market.

Recently the cellar was certified to comply with three other 'quality and safety standards'³⁴ and the ETI code is no longer kept alive. According to management, certification 'improves their competitive advantage on the export market'. They also think that 'it saves time...because importers know what these certifications mean...as a result they are not forever bringing people to inspect the cellar'. They are convinced 'that wines with these certifications are listed more easily in the British market' (Landbou Weekblad, 28.9.2004). There can be no question that the ETI pilot paved the way for what is clearly an enthusiastic management approach to codes today³⁵.

At the level of the farm, however, things look slightly different. It was clear that the owners of the farm share the sense of pride in commercial success. However, we never got the impression that they were either particularly informed on the code or focused on it. Instead the focus was very much on domestic labour legislation. It soon became clear to us that the farmer had only grudgingly adapted to the new rights of his employees. As a tit-for-tat to the introduction of the minimum wage (March 2003), he took away some

³³ Initially the idea was to link improvements in housing to the payment system for grapes, but at the time of writing this had not yet come into effect.

³⁴ These are ISO 9001:2000, HACCP, and BRC.

³⁵ However, in initial talks with WIETA this cellar was not particularly interested in joining. Perhaps it is another case of 'code overload'.

of the other benefits hitherto given to the workers. Casual workers, for instance, now had to pay for their transport between farm and town. Displaying very a much an authoritarian style from a previous era, the atmosphere between employer and workers was rather tense. We decidedly got the impression that had it not been for the co-op management, this farm would never have signed up voluntarily to the code. They may well have been amongst the initial resisters.

Looking at the five adopters as a whole, the last two cases clearly illustrate that the impact of the codes on companies is less, where a) adoption occurs under pressure, and b) where the centre of adoption is one step removed³⁶. Of course this is especially true of co-operative farms.

4.2.2 Non-Adopters (11)

Five of the farms in this category are private cellars, five are co-op farms and one is a combination of co-op farm and private cellar. Most companies are managed by the owner himself. In only two cases is the farm managed by a manager or a team.

In only four cases are grapes and/or wine responsible for 100% of the turnover. The rest rely on mixed farming.

On average the companies export only 24.5% of their production. Only four companies export directly. All others deliver to producing wholesalers who blend and export. However, in this way four of the companies act as suppliers to two of the most successful brands in the UK market, viz. 'Arniston Bay' (red and white) and 'Kumala'.

During the first series of management interviews in 2002, only three of the owners/managers 'had heard of codes'. However, they could not elaborate. Three years on most knew that codes had become diffused. Towards the end of 2004 three of the companies had signed up to WIETA. The owner of one of these said that his Dutch buyers and agents were 'asking more and more questions about chemicals'. He also felt that in order to get ahead 'all cellars in his region needed to be WIETA conscious'³⁷. In fact, the co-op to which he delivered some of his grapes had recently become a member of WIETA.

The co-op of another non-adopting company in the Olifantsriver region had also joined WIETA. According to the manager 'the guys [i.e. farmers] realised they can no longer do as they like'.

Looking at these responses, it would appear that these companies, like some of the adopters above, had recently joined WIETA because they regarded it as a necessity for gaining guaranteed access to overseas markets. However, none of the companies –

³⁶ This is also illustrated by another farm linked to the same co-op. Here the owner continued to sell cheap alcohol in foil bags to workers and the public, despite a cellar decision to terminate the practice. It was a potential source of huge embarrassment to the cellar should this be discovered by a supermarket inspector. Nevertheless, it took another four years and two confrontations with cellar management before the owner heeded the decision.

³⁷ Historically this region near Worcester was conservative and non-innovating in all respects. Cellars in this valley are under tremendous pressure to catch up, become market conscious and socially more responsible.

whether adopter or (previously) non-adopter - thought that adoption had given them a competitive advantage in the market.

4.3. The workers

In order to assess the impact of codes on workers we compared the position of permanent and casual workers, men and women, at adopting and non-adopting companies over a period of three years (2002-2004). We did this on the basis of descriptive statistics generated by our questionnaires and interviews. Items in the questionnaire served as indicators of workers' 'material wealth', 'social well-being', quality of 'housing' and 'empowerment'. Thus we are using a composite index which needs to be discussed in its entirety when comparing two groups of workers. However, because every comparison involves a detailed analysis, we cannot do all of this in the text. The sections dealing with the first two comparisons include all the relevant tables, however, for the others, tables are used selectively to support the main conclusions. A full list of tables can be found in Annex 5.

4.3.1 Comparing permanent workers at adopting and non-adopting companies

It is clear from Table 7 below, that code adopting farms employ a higher percentage of women, although the trend over the research period (2002-2004) was for both types companies to reduce the number of women in their permanent employ. Adopting companies tend to employ more couples.

The educational level of workers at adopting farms is higher. This may be the reason why a greater proportion of workers at adopting farms are employed in more skilled and better-paid jobs. This also means that there is more scope for upward mobility at these companies.

Table 7: General profile of permanent workers

	Adopters Baseline 2002	Non- Adopters Baseline 2002	Adopters 2003	Non- Adopters 2003	Adopters 2004	Non- Adopters 2004
Women as % of total workforce	45.8	22.8	39.4	22.8	33.3	15.0
Percentage Afrikaans speakers	96.6	91.1	100.0	89.5	95.2	92.5
Percentage of workers whose partner is also employed on the farm	67.8	59.4	76.0	63.8	71.4	62.5
Percentage of workers who have completed five years of schooling (i.e. are literate)	72.9	54.5	71.4	49.1	71.4	57.5
Average no. of years spent at school	7.03	5.38	N/A	N/A	6.95	5.38
General workers as % of total workforce	61.0	71.3			61.9	70.0
No. of people in household	3.86	3.83			4.38	4.30
No. of income earners in household	2.19	2.23			2.38	2.35

A greater percentage of workers employed at adopting companies live off-farm. Regarding the quality of housing, workers employed at adopting farms are clearly better off, especially with regard to electricity provision, ablution and sanitation facilities (Table 8). None of them live in informal housing. Comparing data from the monitoring rounds, there were no clear trends emerging over time.

Table 8 Housing of permanent workers

	Adopters Baseline 2002	Non- Adopters Baseline 2002	Adopters 2003	Non- Adopters 2003	Adopters 2004	Non- Adopters 2004
Percentage of total workforce who live off-farm	11.9	6.9	9.1	10.5	23.8	10.0
Percentage of total workforce who live in formal (i.e. brick) housing	98.3	97.0	100.0	94.7	100.0	95.0
Percentage of total workforce whose houses have ceilings	72.9	83.2	72.7	80.7	66.7	77.5
Percentage of total workforce whose houses have electricity for lights, cooking, heating and warm water	44.1	25.7	30.3	21.1	52.4	25.0
Percentage of total workforce who have to pay for all electricity	17.9	43.6	N/A	N/A	42.9	37.5
Percentage of total workforce who have piped water into their plot or home	86.4	88.1	84.8	86.0	81.0	77.5
Percentage of total workforce whose houses have a wash basin and bath or shower	39.0	30.7	34.4	28.0	42.9	30.0
Percentage of total workforce whose houses have a flush toilet	81.4	73.3	78.8	70.2	90.5	75.0

Workers at adopting companies are better off with regard to most aspects of material life (Table 9). In 2004 they earned almost R 100 per week more than their counterparts at non-adopting farms. This puts them in a position to own more homes, durables and cars.

Table 9: Material wealth of permanent workers

	Adopters Baseline 2002	Non- Adopters Baseline 2002	Adopters 2003	Non- Adopters 2003	Adopters 2004	Non- Adopters 2004
Cash wage per week (before deductions) Rand	280.86	257.33	288.02	249.73	361.83	268.45
Percentage of total workforce who possess their own home	4.4	6.0	6.0	8.8	14.3	7.5
Percentage of total workforce who have a stove	62.7	51.5	66.7	43.9	71.4	65.0
Percentage of total workforce who own a refrigerator	49.2	57.4	54.5	61.4	66.7	77.5
Percentage of total workforce who own a television set	59.3	61.4	78.8	75.4	85.7	70.0
Percentage of total workforce	18.6	5.0	18.2	7.0	19.0	10.0

who own a car						
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There was a consistent rise in the cash wage of permanent workers at adopting companies. The cash wage at non-adopters not only fell back in 2003, but the subsequent recovery to a higher level was far lower than in the case of adopters. The consistent increase in the latter's wages is also reflected in the increased ownership of durables over the three year period. There was less consistency in the case of non-adopting companies.

Table 10: Social well-being of permanent workers

	Adopters Baseline 2002	Non- Adopters Baseline 2002	Adopters 2003	Non- Adopters 2003	Adopters 2004	Non- Adopters 2004
Percentage of total workforce who think they will be allowed to stay on in farm cottage even if they lose their job	49.2	27.7	54.6	24.6	38.0	22.5
Percentage of total workforce who are given wine as part of remuneration	15.3	7.9	0.0	7.1	0.0	2.5
Percentage of total workforce who are provided with protective clothing when spraying pesticides	81.4	44.2	81.8	36.4	61.9	47.5
Percentage of total workforce whose medical care is subsidized by employer	79.6	55.1	60.6	45.5	57.1	35.0
Percentage of total workforce who are exposed to HIV/AIDS education through employer	45.8	25.7	72.7	33.3	90.5	42.5
Percentage of total workforce who have access to a crèche	98.3	60.4	90.9	45.6	90.5	50.0
Percentage of total workforce whose children's education is subsidized by the employer	28.8	12.1	35.5	17.9	4.8	10.0
Percentage of total workforce who never suffer verbal abuse by the employer	76.3	57.0	78.8	50.9	66.7	62.5
Percentage of total workforce who never suffer physical abuse by the employer	94.9	87.0	90.9	89.5	90.5	92.5
Percentage of total workforce who think their employer will not retrench them even if their partner loses hers/his	49.2	45.5	63.6	52.6	71.4	50.0
Percentage of total workforce whose children (under age 16) work on the farm	0.0	1.0	0.0	0.0	0.0	0.0

In terms of social well being, permanent workers at adopting companies are also doing better (Table 10). They have a feeling of greater job and tenure security, are more generously subsidized by their employers as far as health care is concerned and have better access to day care facilities and protective clothing. At both types of companies

workers are increasingly exposed to HIV/Aids education, although this is far more so in the case of adopters.

At both types of companies there is a consistent decline in the provision of alcohol as part of remuneration (the ‘tot’ system) – to the point where it is almost non-existent on both types of farms. Child labour seems to have completely disappeared. Also few workers still suffer physical abuse by the employer.

Table 11: Empowerment of permanent workers

	Adopters Baseline 2002	Non- adopters Baseline 2002	Adopters 2003	Non- Adopters 2003	Adopters 2004	Non- adopters 2004
Percentage of total workforce who are in possession of a written employment contract	88.1	49.5	90.9	55.4	95.2	75.0
Percentage of total workforce who are indebted to the employer	22.0	15.9	32.4	29.8	23.8	25.0
Percentage of total workforce who are members of an empowerment scheme	8.5	3.0	15.2	3.5	19.0	0.0
Percentage of total workforce who are members of a trade union	5.1	10.9	3.0	19.3	4.8	22.5
Percentage of total workforce who are aware of codes of practice	45.8	13.9	21.2	19.3	28.6	32.5

The favourable picture regarding workers’ position at adopting companies is completed when looking at empowerment (Table 11). Although workers at both types of companies increasingly get the benefit of a written employment contract, considerably more workers at adopting farms are in possession of a written employment contract and almost a fifth are set to benefit from some empowerment scheme. One of the 11 non-adopting farms launched such a scheme in 2002, including new housing, but at the time of writing the workers had not yet benefited from it. While the scheme holds a lot of promise, workers’ existing housing is some of the worst we have encountered.

At non-adopting companies more workers have joined trade unions over the three year period. Here we also witness an increasing awareness of codes of practice. Ironically this tends to fluctuate at code adopting farms.

The favourable working and living conditions of permanent workers at adopting companies may partly explain the low level of unionisation. However, it may also be due to strong anti-union attitudes in two out of five cases.

On almost all indicators, permanent workers employed at code adopting farms are better off. *In our view, however, this not mainly due to the codes.* Three of the five code adopters are amongst the most progressive companies in the industry and had introduced social development programmes well *before* the adoption of codes in 1999/2000. Their combined weight pushes up the average score of companies in this

category. In the case of one co-op farm, the code has had no visible effect. In fact, the company can be said to be in breach of some of the code provisions.

The code has had its greatest effect on the second co-op farm. Very soon after the adoption of the code the co-op launched a programme for the upgrading of worker housing. In addition members of the co-op's board have admitted that the possibility of losing the listing with a British supermarket was the reason behind sending out a directive instructing farmers to terminate certain practices, including the 'tot system'. In the face of weak enforcement by the state, the code provided the necessary pressure.

4.3.2 Comparing women and men permanent workers at code adopting farms

Comparing the position of men and women permanent workers, a higher percentage of men are literate and hold a higher percentage of the better-paid jobs. More men have their partners working on the farm.

Table 12: General profile of permanent workers - women and men, at code adopting farms

	Women Baseline 2002	Men Baseline 2002	Women 2004	Men 2004
Percentage of total workforce	45.7	54.3	33.3	66.6
Percentage Afrikaans speakers	100.0	93.8	100.0	92.9
Percentage whose partner is also employed on the farm	59.3	75.0	57.1	78.6
Percentage who have completed five years of schooling (i.e. are literate)	77.8	68.8	57.1	78.6
Percentage general workers	63.0	59.4	85.7	50.0
No. of people in household	3.78	3.94	4.14	4.50
No. of income earners in household	2.11	2.25	2.00	2.57

A greater percentage of men live off-farm. All things being equal, this gives them greater job mobility. However, the quality of housing is very much on par – better for men in some respects, but worse in others (Table 13).

Table 13: Housing of permanent women and men workers at code adopting farms

	Women Baseline 2002	Men Baseline 2002	Women 2004	Men 2004
Percentage who live off-farm	11.1	12.5	16.3	28.6
Percentage who live in formal (i.e. brick) housing	96.3	100.0	100.0	100.0
Percentage whose houses have ceilings	70.4	75.0	71.4	64.3
Percentage whose houses have electricity for lights, cooking, heating and warm water	51.9	37.5	57.1	50.0
Percentage who have to pay for all electricity	7.7	26.7	42.9	42.9
Percentage who have piped water into their plot or home	92.6	81.3	71.4	85.7
Percentage whose houses have a wash basin and bath or shower	48.1	35.3	57.1	35.7

Percentage whose houses have a flush toilet	77.8	84.4	85.7	92.9
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Men continue to earn considerably more and do better with regard to durable possessions, although this is not consistently so (Table 14).

Table 14: Material wealth of women and men permanent workers at code adopting farms

	Women Baseline 2002	Men Baseline 2002	Women 2004	Men 2004
Cash wage per week (before deductions) Rand	298.59	265.91	272.64	406.43
Percentage who possess their own home	3.7	6.2	14.3	14.2
Percentage who have a stove	70.4	56.3	71.4	71.4
Percentage who own a refrigerator	55.6	43.8	57.1	71.4
Percentage who own a television set	66.7	53.1	85.7	85.7
Percentage who own a car	14.8	21.9	14.3	21.4

Table 15: Social well-being of women and men permanent workers at code adopting farms

	Women Baseline 2002	Men Baseline 2002	Women 2004	Men 2004
Percentage who think they will be allowed to stay on in farm cottage indefinitely even if they lose their job	18.5	21.9	28.6	14.3
Percentage who are given wine as part of remuneration	18.5	12.5	0.0	0.0
Percentage who are provided with protective clothing when spraying pesticides	70.4	90.6	71.4	57.1
Percentage whose medical care is subsidized by employer	80.8	78.6	57.1	57.1
Percentage who are exposed to HIV/AIDS education through employer	59.3	34.4	100.0	85.7
Percentage who have access to a crèche	96.3	100.0	100.0	85.7
Percentage whose children's education is subsidized by the employer	33.3	25.0	14.3	0.0
Percentage who never suffer verbal abuse by the employer	88.9	65.6	57.1	71.4
Percentage who never suffer physical abuse by the employer	88.9	100.0	100.0	85.7
Percentage who think their employer will not retrench them even if their partner loses hers/his	40.7	56.3	57.1	78.6
Percentage whose children (under age 16) work on the farm	0.0	0.0	0.0	0.0

Women do better with regard to six of the eleven indicators used here (Table 15). However, they suffer more job insecurity than men, knowing from experience that their

continued employment depends very much on their partner keeping his job. Paradoxically though, more women than men seem to have a feeling of tenure security.

Table 16: Empowerment of women and men permanent workers at code adopting farms

	Women Baseline 2002	Men Baseline 2002	Women 2004	Men 2004
Percentage who are in possession of a written employment contract	88.9	87.5	100.0	92.9
Percentage who are indebted to the employer	14.8	28.1	28.6	28.5
Percentage who are members of an empowerment scheme	0.0	15.6	14.3	21.4
Percentage who are members of a trade union	3.7	6.3	0.0	7.1
Percentage who are aware of codes of practice	59.3	34.4	28.6	28.6

Table 16 very much presents a picture of parity, except for the benefits of an empowerment scheme. More men belong to a trade union, but more women are in the possession of a written employment contract.

On the whole permanent men workers employed at code adopting companies are better off than women, although there is not a huge gulf separating the two groups.

4.3.3 Comparing permanent women workers with permanent men workers at non-adopting farms

Permanent women and men workers at non-adopting farms find themselves very much on par. Men are better off in terms of material wealth, but women are in a better position with regard to their social well-being (see Table 17 and Table 18 below). This pattern holds for the rest of the data (see Annex 5, tables 21-25).

Table 17: Material wealth of women and men permanent workers at non-adopting farms

Mean	Women Baseline 2002	Men Baseline 2002	Women 2004	Men 2004
Cash wage per week (before deductions) Rand	174.57	283.40	192.50	281.85
Percentage who possess their own home	0.0	7.7	0.0	6.8
Percentage who have a stove	56.5	50.0	16.7	73.5
Percentage who own a refrigerator	60.9	56.4	66.7	79.4
Percentage who own a television set	69.6	59.0	50.0	73.5
Percentage who own a car	4.3	5.1	0.0	11.8

Table 18: Social well-being of women and men permanent workers at non-adopting farms

Mean	Women Baseline 2002	Men Baseline 2002	Women 2004	Men 2004
Percentage who think they will be allowed to stay on in farm cottage indefinitely even if they lose their job	16.1	7.7	0.0	5.9
Percentage who are given wine as part of remuneration	13.0	6.4	0.0	2.9
Percentage who are provided with protective clothing when spraying pesticides	45.5	43.8	66.7	43.1
Percentage whose medical care is subsidized by employer	56.5	54.7	50.0	32.4
Percentage who are exposed to HIV/AIDS education through employer	21.7	26.9	33.3	44.1
Percentage who have access to a crèche	69.6	57.7	66.7	47.1
Percentage whose children's education is subsidized by the employer	9.1	13.0	16.7	8.8
Percentage who never suffer verbal abuse by the employer	65.2	54.5	88.3	58.8
Percentage who never suffer physical abuse by the employer	93.1	85.7	100.0	91.2
Percentage who think their employer will not retrench them even if their partner loses hers/his	43.5	46.2	33.3	52.9
Percentage whose children (under age 16) work on the farm	4.3	0.0	0.0	0.0

4.3.4 Comparing casual workers at code adopting farms with casuals at non-adopters

At both adopting and non-adopting farms there is a trend to employ fewer casual women. Despite opposite trends, both settled at approximately the same level regarding Afrikaans speaking and literate workers in 2004.

Table 19: General profile of casual workers at code adopting and non-adopting farms

	Casuals at Adopters Baseline 2003	Casuals at Non-Adopters Baseline 2003	Casuals at Adopters 2004	Casuals at Non-Adopters 2004
Women as % of total workforce	61.9	75.0	54.5	52.9
Percentage Afrikaans speakers	81.0	50.0	63.6	64.7
Percentage who have completed five years of schooling (i.e. are literate)	95.0	65.0	86.4	87.5
Percentage of General workers	95.2	95.5	100.0	100.0
No. of people in household	4.48	4.73	4.40	3.76
No. of income earners in household	3.52	2.59	2.45	2.35

In terms of housing, there is tendency at adopting farms for more casual workers to live on-farm (Table 20). This may reflect a trend mentioned above, i.e. the apparent

tendency for adopters to employ more couples. In such cases the man is employed permanently and the wife on a casual basis. At non-adopting farms an increasing percentage live off-farm. Regarding changes in the quality of worker housing there was no consistent overall trend – a deterioration in some respects and an improvement in others. This also varies between adopters and non-adopters.

Table 20: Housing of casual workers at code adopting and non-adopting farms

	Casuals at Adopters Baseline 2003	Casuals at Non-Adopters Baseline 2003	Casuals at Adopters 2004	Casuals at Non-Adopters 2004
Percentage who live off-farm	100.0	65.0	63.6	76.5
Percentage who live in formal (i.e. brick) housing	90.5	75.0	86.4	58.8
Percentage whose houses have ceilings	42.9	65.0	72.7	23.5
Percentage whose houses have electricity for lights, cooking, heating and warm water	19.0	20.0	18.2	11.8
Percentage who have to pay for all electricity	75.0	65.0	71.4	47.1
Percentage who have piped water into their plot or home	85.7	90.0	77.3	85.8
Percentage whose houses have a wash basin and bath or shower	26.6	20.0	18.2	23.6
Percentage whose houses have a flush toilet	90.5	80.0	81.8	76.5

The cash wage for casuals at both types of companies rose over the two-year period, although much more dramatically in the case of adopting farms (Table 21). This is reflected in increased home ownership and the ownership of a number of durable goods.

Table 21: Material wealth of casual workers at code adopting and non-adopting farms

Mean	Casuals at Adopters Baseline 2003	Casuals at Non-Adopters Baseline 2003	Casuals at Adopters 2004	Casuals at Non-Adopters 2004
Cash wage per week (before deductions) Rand	179.09	179.05	291.93	192.73
Percentage who possess their own home	19.0	40.0	31.8	36.3
Percentage who have a stove	66.7	30.0	66.7	56.3
Percentage who own a refrigerator	52.4	55.0	57.1	50.0
Percentage who own a television set	47.6	70.0	81.0	37.5
Percentage who own a car	4.8	0.0	0.0	6.3

At both adopting and non-adopting companies the provision of alcohol, the use of child labour and the physical abuse of casual workers has come to an end. At both types of companies an increasing number of casual workers receive HIV/Aids education. While non-adopters are catching up, the level of HIV/Aids education is still three times higher at adopting companies.

Table 22: Social well-being of casual workers at code adopting and non-adopting farms

Mean	Casuals at Adopters Baseline 2003	Casuals at Non-Adopters Baseline 2003	Casuals at Adopters 2004	Casuals at Non-Adopters 2004
Percentage who are given wine as part of remuneration	0.0	0.0	0.0	0.0
Percentage who are exposed to HIV/AIDS education through employer	33.0	5.0	54.5	17.6
Percentage who have access to a crèche	57.1	25.0	77.3	64.7
Percentage who never suffer verbal abuse by the employer	66.7	95.0	86.4	58.8
Percentage who never suffer physical abuse by the employer	100.0	95.0	100.0	100.0
Percentage whose children (under age 16) work on the farm	4.8	0.0	0.0	0.0

At both types of companies there is an increasing trend to have a written employment contract with casual workers and in this regard, non-adopting companies are starting to close the gap with adopters (Table 23). Membership of trade unions fluctuates at these two types of farms, but at both it remains very low. Awareness of codes of practice has increased amongst casual workers employed at non-adopters, but in neither case does it exceed 20% of the workforce.

Table 23: Empowerment of casual workers at code adopting and non-adopting farms

	Casuals at Adopters Baseline 2003	Casuals at Non-adopters Baseline 2003	Casuals at Adopters 2004	Casuals at Non-adopters 2004
Percentage who are in possession of a written employment contract	52.4	30.0	54.5	47.1
Percentage who are indebted to the employer	42.9	15.0	22.7	23.5
Percentage who are members of a trade union	0.0	10.0	4.5	5.9
Percentage who are aware of codes of practice	19.0	0.0	18.2	11.8

4.3.5 Comparing women casual workers and men casual workers at non-adopting companies

Worst off of all groups of workers are casual men employed by non-adopting farms. On most indicators of material wealth, empowerment and social well-being, casual women workers do better (see tables 24-26 below). This also goes for housing (see Annex 5, tables 36-40).

Table 24: Material wealth of women casual workers and men casual workers at non-adopting companies

Mean	Women Baseline 2003	Men Baseline 2003	Women 2004	Men 2004
Cash wage per week (before deductions) Rand	175.73	189.00	203.62	183.05
Percentage who possess their own home	33.4	60.0	44.4	25.0
Percentage who have a stove	33.3	20.0	50.0	62.5
Percentage who own a refrigerator	60.0	40.0	50.0	50.0
Percentage who own a television set	80.0	40.0	37.5	37.5
Percentage who own a car	0.0	0.0	0.0	12.5

Table 25: Social well-being of women casual workers and men casual workers at non-adopting companies

Mean	Women Baseline 2003	Men Baseline 2003	Women 2004	Men 2004
Percentage who are given wine as part of remuneration	0.0	0.0	0.0	0.0
Percentage who are exposed to HIV/AIDS education through employer	6.7	0.0	22.2	12.5
Percentage who have access to a crèche	26.7	20.0	66.7	62.5
Percentage who never suffer verbal abuse by the employer	93.3	100.0	55.6	62.5
Percentage who never suffer physical abuse by the employer	93.3	100.0	100.0	100.0
Percentage whose children (under age 16) work on the farm	0.0	0.0	0.0	0.0

Table 26: Empowerment of women casual workers and men casual workers at non-adopting companies

Mean	Women Baseline 2003	Men Baseline 2003	Women 2004	Men 2004
Percentage who are in possession of a written employment contract	26.7	40.0	44.4	50.0
Percentage who are indebted to the employer	20.0	0.0	0.0	50.0
Percentage who are members of a trade union	6.7	20.0	11.1	0.0
Percentage who are aware of codes of practice	0.0	0.0	11.1	12.5

4.3.6 Comparing casual workers at code adopting companies with permanent workers at non-adopters

The analysis above shows that permanent and casual workers at non-adopting farms are worse off than their counterparts at code adopting farms. Importantly, casual workers at code adopting farms and permanent workers at non-adopting farms appear to be comparable as shown in tables 27 and 28.

Table 27: Housing for casual workers at code adopting companies and permanent workers at non-adopters³⁸

	Casuals at Adopters Baseline 2003	Permanents at Non-Adopters Baseline 2002	Casuals at Adopters 2004	Permanents at Non-Adopters 2004
Percentage who live off-farm	100.0	6.9	63.6	10.0
Percentage who live in formal (i.e. brick) housing	95.0	97.0	86.4	95.0
Percentage whose houses have ceilings	42.9	83.2	72.7	77.5
Percentage whose houses have electricity for lights, cooking, heating and warm water	19.0	25.7	18.2	25.0
Percentage who have to pay for all electricity	75.0	43.6	71.4	37.5
Percentage who have piped water into their plot or home	85.7	88.1	77.3	77.5
Percentage whose houses have a wash basin and bath or shower	28.6	30.7	18.2	30.0
Percentage whose houses have a flush toilet	90.5	73.3	81.8	75.0

While the permanents enjoy better quality housing, the casuals actually do better with regard to material wealth.

Table 28: Material wealth of casual workers at code adopting companies and permanent workers at non-adopters

Mean	Casuals at Adopters Baseline 2003	Permanents at Non-Adopters Baseline 2002	Casuals at Adopters 2004	Permanents at Non-Adopters 2004
Cash wage per week (before deductions) Rand	179.09	257.33	291.13	268.45
Percentage who possess their own home	19.0	6.0	31.8	7.5
Percentage who have a stove	66.7	40.6	66.7	37.6
Percentage who own a refrigerator	52.4	57.4	57.1	77.5
Percentage who own a television set	47.6	61.4	81.0	70.0
Percentage who own a car	4.8	5.0	0.0	10.0

The rest of the statistics tell the same story. When looking at the indicators as a whole (see Annex 5, tables 26-30), permanent workers at non-adopting farms are not better off than casuals at adopting farms.

³⁸ Note that the 2003 survey of seasonal workers is treated as the Baseline for 'Casual' workers. Hence there was only one monitoring round and the trend analysis only stretches over two years.

4.3.7 Overall ranking of workers conditions.

When comparing the different categories of workers on the basis of the composite index, the following ranking emerges:

Table 29: Ranking of workers in terms of impact indicators

Rank	Category of workers		
1.	Permanent men workers at adopting companies		
2.	Permanent women workers at adopting companies		
3.	Permanent men workers at non-adopting companies	Permanent women workers at non-adopting companies	Casual workers at adopting companies
4.	Casual women workers at non-adopting companies		
5.	Casual men workers at non-adopting companies		

Some important conclusions can be drawn from this analysis:

- a) The status of the company (i.e. code adopting or non-adopting) is the most important variable determining the position of workers. This is borne out by the fact that permanent women workers at code adopting companies are better off than permanent men workers at non-adopting farms. Casual workers at adopting companies are on par with the latter.
- b) Job status (i.e. permanent or casual) is more important than gender: permanent women workers are better off than casual men workers at adopting companies; permanent women workers are on par with permanent men workers at non-adopting companies; the former are better off than casual men workers at non-adopting companies.

The importance of job status is also underlined by other evidence not contained in the data tables above, viz. even at code adopting companies there is a marked difference between the position of permanent and casual workers: the former often share in the benefits of an empowerment scheme, a subsidised pension scheme, medical care and the like, while casuals recruited off-farm³⁹ only earn a wage. Only in one out of five cases do casual workers share in the on-farm medical care and does the company recruit the same workers year after year. In the other four cases no ‘regular employment’ is provided as required by some of the codes and as articulated by casuals early on in the project. Thus, neither a pre-existing ethos of social responsibility, nor codes of practice have narrowed the gap between permanents and casuals at adopting companies.

Although there is a correlation between company status on the one hand and the ‘material wealth’ etc. of workers on the other, we want to reiterate that this should not be attributed mainly to the codes. Three out of five adopting companies in our study had already surpassed code ‘standards’ by the time the latter were introduced. They did not adopt the codes because they were not ‘up to standard’, but because their clients asked them to or because they wanted to send out a signal to an industry which needed to

³⁹ The position of on-farm casuals is different and more privileged. Typically, casual women married to permanent men workers are employed regularly during peak times and share in the benefits of their husbands, including empowerment schemes.

make a fresh start. Be that as it may, their exemplary social responsibility ‘performance’ is reflected in the indicator data and pushes up the average ‘scores’ of the adopter group.

Aside from the one straggler in the adopter group, the impact of the codes lies elsewhere: virtually unknown before 1998, the idea of ‘codes of practice’ has become diffused throughout large parts of the South African wine industry. Adoption has now reached over 70 companies. It has become part of the discourse and focused the collective mind on what the most important overseas markets require. It has come to be perceived as an entry ticket to a competition: even if winning is not guaranteed, at least one can participate.

4.4. Household case studies

For the purposes of the household studies, one adopting and one non-adopting farm was selected in each of three regions, viz. Stellenbosch/Paarl, Robertson and Olifantsriver. At each company we selected one permanent and one casual employee, covering both male and female workers and their respective households. We paid two visits to each household – the first one in late 2003 and a follow-up visit in March 2004. On average these visits lasted three and a half hours and included interviews with one or more members of the household. Four of these case studies are summarised below.

Aside from ‘mapping’ the assets, structure, human capital, decision making and survival strategies of the household, we also asked them if their lives had changed significantly over the last ten years and if so, what they attributed this to. Hypothetically at least, codes of practice were one possible reason. However, we did not find this to be the case. First of all, we found great unevenness between households with regard to assets and the other indicators mentioned above – unevenness not only within categories of companies (i.e. adopters and non-adopters), but also across. Put differently, households within the adopter group, for instance, were not all more comfortable and secure and better off than households in the non-adopter group. Life chances, socio-economic position and vulnerability depend first and foremost on personal and family circumstances, additional sources of household income and to a lesser extent on employment status (i.e. permanent or casual) (cases 1 and 3). The most vulnerable households in our sample were single mother households with a high number of dependents (case 2). Of course, all things being equal, single mothers with a permanent job were more secure than casual women working as seasonals. Where casual women workers had a little more security, this was due to the social responsibility culture of two adopters in our sample of six farms. Despite having job security, conditions for a male permanent worker at a non adopting farm were found to be rather poor compared with permanent workers at adopting farms or farms with a culture of social responsibility (case 4).

Ten out of twelve households thought that their lives had changed for the better since 1994. These households were unanimous that labour laws and the vote had given them real rights and restored their dignity (e.g. case 5), that medical care was better, that crime was down (in one case) and most of all, that the educational opportunities for their children were much improved⁴⁰. However, this was all attributed to the new government. The same people expressed a desire for better wages, land and homes of

⁴⁰ Without exception the response was: ‘We can now send our children to any school we like’. More often than not this meant former ‘Model C’ or whites only schools, which are perceived to be better.

their own. Again, they pinned their hopes on government. Codes of practice were not mentioned.

Case 1. Female seasonal worker at a code adopting farm.

Margaret⁴¹ is a seasonal worker on a code adopting farm. She lives with her partner and their two children. Their home consists of one room - divided into eating and sleeping areas and a separate bathroom. They have electricity in their home but no water heater. If they need hot or boiling water they have to put on the kettle. They have taps; one inside for drinking and washing, and one outside their home. They have a TV, and like to watch the news and dramas. They do not have a telephone at the moment. They do not own a private vehicle and so use public transport.

The home is neat and tidy and decorated with plants and flowers. They have a big plot with a lawn and a swing for the children. They own the plot and are paying R97 monthly to the Stellenbosch municipality. They do not have any other property.

Both Margaret and her partner have been educated up to grade 8. Neither has any formal qualification. Both their children attend school. The school fees for the child in grade 6 are R150 per year, but Margaret has an arrangement with the principal to pay the money on a monthly basis. The family is healthy; for any major injuries they would go to the Stellenbosch provincial hospital. For any other injuries or illnesses they go to a clinic and pay for any expenses.

Margaret is the one responsible for cooking food, doing the washing and cleaning up. Her partner helps, especially at times when she is not around. He likes to work outside in the garden. Decisions on buying of household items or furniture are made jointly.

Margaret is doing seasonal work at the moment, working from 7h00 to 17h00 and earning R200 per week. The period for seasonal work lasts from September to March. Her partner is a permanent worker at a steel factory and is earning R531 per week. They have the same working hours. Apart from their two salaries, they have no other source of income. In discussing how their lives had changed, Margaret commented:

“Our own position changed after 1994. For example, we used to live in the squatter camp with no water near the home. Sometimes when the water tanks were empty we had to borrow water from neighbours and friends. Now things have changed; we have our own home and are paying it off on a monthly basis. We do not really have to pay for medicine and children can attend any school they like. The position of workers has also changed. There are so many rights for workers; they just have to access their rights. I think more work should be done with farm workers”.

In case the family needs any information on labour issues Margaret would ask her friend who is a member of the Women on Farms Project. For any other information they would ask a family friend.

Margaret's ambition for the future is to complete her schooling and have some opportunities to study further. She would like to do a course in social work. Her partner would like to have more training on the job which would better his position and mean more money for the family. One of Margaret's biggest dreams for the future was to get a permanent job and a better salary so that she will be able to give more to her children.

⁴¹ All names have been changed to ensure anonymity.

Case 2 - Female permanent worker at a non adopting farm.

Marie is 25 years old and heads this household. Her mother died last year and since then, she is struggling to survive. The other members of the household are her sister who is in high school and her young son who is in primary school. The family are living in a 6 room house consisting of 3 bedrooms, a toilet, dining room, lounge and kitchen. The farm owner is the legal owner of the house. Marie does not pay any rent, nor does she own any other property. The home is well furnished, with 2 sets of different household items; 2 deep freezes, fridges, microwaves, washing machines, lounge suites and kitchen units. The home is decorated with plants and pictures on the walls.

“My mother was a hard working person who did not earn much. For most of her life she was a farm worker and believed that one should save and leave enough behind for her children. One of her main missions was that her 2 daughters would never fight as a result of furniture or assets. She always said it was important to keep the family together”.

They have electricity for lighting, cooking and for electrical appliances. They have piped water to the kitchen sink for drinking water and a tap outside for use in the garden. They have radio and TV and like to watch their favourite movies and soaps like “Sewende Laan” because it is something they as a family can watch together. They read the newspaper ‘Rapport’, on Sundays. Marie and the family use public transport, mainly at weekends when they go shopping in the nearest town.

Marie is the only one in this household that is earning a salary. She is permanently employed and works as an office assistant. Her hours are from 7h30 in the morning to 17h00 in the afternoon and she earns R1,250.00 per month. There is no other source of income and Marie is really trying to cope in these circumstances. Her sister’s school fees are R170 per month; although her transport costs are covered by the state. Her son’s school fees are R100 per month and Marie has also to cover his transport cost. The state only pays for the transport cost to the nearest school. Marie has a long term savings plan with Old Mutual. She has not received any loan from anyone and when she has no money she finds ways to survive without having cash at hand. Marie’s relatives are living in Kwa Zulu Natal and Marie thinks this is actually a good thing. Her view is that family living close by and money are not a good combination at all. Marie says she can only afford to buy new clothes when she has some extra money. At least they don’t have to worry about buying furniture because her mother made sure they have enough. In case anything had to be sold, she and her sister would make a joint decision.

Their health is okay and they suffer no major illnesses. When Marie goes to the doctor, her account is settled by the farm, but when either of the children goes to the doctor she has to pay R80 per consultation.

In discussing changes, Marie said that one of the important changes in her economic position was the wage increase she received since she started the job.

“Since 1994 a lot of things have happened, but for me the fact that my son and sister can attend model C schools where they have more opportunities is very good. As for the health system, the mobile clinics come twice a month which is good. There are more and better services now than in the past. One of the things I think government can do is to ensure that farm workers are better paid. Racism and inequality in terms of race and gender are issues that are very important for me”.

Marie’s ambition is to further her studies so that she can find a better job. Her sister wants a career in music and her son wants to be a chef working in a big hotel.

Case 3. Husband and wife, permanent workers on a non adopting farm.

Deborah is living with her husband and the rest of the family on the farm. They have three children and two foster children. The family is living in a five bedroom home, fully furnished with antique furniture. The house is neatly painted with beautiful curtains and there are plants and paintings on the walls. The lounge is a hive of activity; the place where everybody gathers and where they watch all their favourite TV dramas. The home is the property of the farm owner. The family does not pay rent nor do they have other property.

They have access to water from one tap inside and one tap outside. The shower has a hot water facility; otherwise they have to use the kettle if they need warm/ boiled water for anything.

The family has a vegetable garden and are growing potatoes and beans for their own consumption. They normally buy seed in town when they want to grow flowers. They do not have tools of their own to work in the garden, but borrow some from the farm.

The couple uses their own private vehicle to go into town or elsewhere, except for the end of the month when they use the bus to go into town as it is free, organized by the farm.

The main sources of income are Deborah's salary of R1100 per month, and her husband's salary of R1520 per month. Both are permanent workers. The wife is a general worker and the husband is responsible for irrigation. Other contributions are the monthly grant for the two foster children (R500x2=R1000) per month. The family applied for a loan of R3000 at the bank and are repaying this at the moment with a monthly instalment of R400. If they needed any other financial assistance they would go to the farm management for help.

"In terms of decision making, we discuss matters and then make a joint decision. For example, when we want to borrow money or buy a big item, we have to talk first. We also talk with the children on career choices etc."

Both husband and wife were educated up to grade four. They do not have any formal qualifications, but have attended courses - 'Free to Grow' and a course in irrigation. The husband is attending night classes at the moment. The five children are all in school. The family are in good health at the moment. Deborah has sore lips and went to see a doctor. She believes that she was exposed to pesticides. She also has problems with high blood pressure.

Deborah is the one with the most responsibilities in the home. This includes cooking, doing the washing and the ironing. Her husband helps with other tasks, especially when his wife is short of time, as well as helping the children with their homework.

In relation to changes over the previous decade Deborah noted;

"A lot of things changed after 1994, especially for farm workers. We know now that we have rights and that we can use that. It is not always easy, but you just have to stand on what you believe is the truth. The changes in the education system and the health system are good because we can truly benefit from those. The socio-economic status of the family has changed since 1994; it is much better now than in the past."

They would like the government to assist them with home ownership, to own a plot of land and to earn better salaries. Deborah said that her situation was much better now than in the past; she has a permanent job now and at least the security of that income.

Case 4 - Male permanent worker on non adopting farm

The household consists of three members; Eddie, his common law wife and a lodger. The couple have one child aged 10, who lives with his maternal grandmother in their home town in Northern Cape Province, but who they support financially. They are expecting their second child. The lodger is from their home town and has come as a seasonal worker, staying with them just for the tomato season.

The household lives in a two-roomed house belonging to the farm so they do not pay rent. One of the rooms is used as the couple's bedroom, while the second room is used as a multi purpose room; for guests to sleep in, as a kitchen for cooking and storage of utensils and groceries, and for receiving visitors. The house does not have toilet or bathroom facilities. They use portable basins for washing (in their rooms) and the household uses a hole outside as a toilet, shared with three other households who live in a block of four semi-detached houses.

According to Eddie, the farmer wants the men of the four households to dig a trench for the piping to allow the installation of toilets for the households. However, Eddie refuses to work on this alone; the neighbours are not interested (one is always drunk, one is only interested in his garden and the other feels like Eddie - he is not going to do all the work while all benefit). Eddie also thinks that this is the duty of the farmer as it is his land and they do not own the houses, so they should not do maintenance. A similar situation exists regarding household water. There is no tap inside the house or in the immediate vicinity. The household gets water from a pipe lying across the road, linked to the farm's irrigation system. The proposed trench would also bring water to the household and its neighbours.

The household does not have much furniture, only one bed and a cupboard used for their clothes. The lodger has a makeshift bed of mattresses and blankets. They do their cooking on a kerosene stove with only one plate. There is no refrigerator and food is stored in boxes. The household does not have chairs; they sit on the bed and on empty paint drums or plastic crates. They have only one table used for preparing food as well as eating on. The household gathers fuel wood from the river bed (on the farm) which is used sometimes for cooking and for heating in the winter.

Eddie as a permanent worker is entitled to accommodation on the farm and they feel secure about having a house to stay in. They are also secure about shelter in their home town, as their parents (father in Eddie's case) have their own houses there.

They do not have a garden nor do they keep livestock. As Eddie put it:
*"I do not want to make this my home, as I do not intend to stay here for the rest of my life; I have a home in B***, where my family lives".*

As a permanent worker, Eddie's salary is not affected by seasonal variations. The addition of the lodger to the household has gone some way to easing the financial burden on Eddie. The lodger contributes to food for the household, as well as saving money to take home. The wife works as a casual on the farm, but because of her pregnancy, she does not work in the fields anymore, but works inside making boxes for the tomatoes. She was supposed to stay in their home town after the Christmas holidays, but came back again, mainly to get her Unemployment Benefit card from the farm, as she needs it to receive benefits after the birth of their child.

The farm shop provides some form of food security, with all three of them having access to buying food on credit, as well as short term loans against their salary. Generally the small groceries are bought on the farm. Eddie took a R200 loan from the farm before Christmas to buy presents and clothes for their child, which he is currently

paying back. He tries to save money where possible, particularly now to cover the birth of their child. For instance, he did not go home for the Christmas holiday. He stayed alone on the farm and earned a double bonus - payment in place of the free trip to the Northern Cape and for working extra time.

Although Eddie is permanent in status, like the other two he is relatively unskilled, having learned his agricultural skills on this farm, and having no certification of any sort to back up his acquired skills.

There is a form of security for them in the fact that most of the inhabitants of the farm originate from the same home town, and the foreman tends to source seasonal and additional labour from there. The wife described the farm as a ghost farm during Easter and Christmas because most of the people go home to the Northern Cape.

The farm they are staying on was originally hired by two neighbouring farmers as one of two farms which they farmed jointly. After some time, one of them bought the farm, although they still shared a workforce and farmed the two farms as one concern. The other farmer (not their owner) started an equity share scheme for the workers on his farm, but those living on this farm were excluded from the scheme. There was also an intention to select those workers who had been working there for a long time. Some of the people living on this farm feel discriminated against as they were working together and the two farms were farmed as one concern, while for the empowerment scheme they were treated as two different farms. The people in this household feel that since the owner bought the farm, their situation has gone backwards, as they are now his workers and not workers in the joint concern. They feel the other farmer was more progressive in his approach to labour and the houses on the other farm are much better equipped than the houses they are living in. They also are upset about the situation with toilet facilities and provision of household water, as the stand-off over the digging of the trench has been going on for more than two years.

As for future plans, the lodger intends to return home at the end of the season and will use the money he has earned to survive until he finds other employment. The wife will not return to the farm after the Easter holidays. She is planning to stay in her home town for the birth of the child in May, and for the next few months as well. She will have the support of her whole family there, as well as being able to receive unemployment benefits for at least nine months. After the birth of her child she will receive the Child Support Grant (CSG) from the State (amounting to R160 per month). She is adamant that she will not return to the farm, as she cannot access the grant in the Western Cape if she registers in the Northern Cape. However, she does not want to raise the new child away from his/her father; she would like them to be together after the birth of the child. She would prefer Eddie to live with them wherever they might settle. As she will have some form of income secured through the CSG, they will not starve even if Eddie struggles to find comparable employment in the Northern Cape.

Eddie is of two minds: he wants to stay on the farm in the medium term, but he does not want his wife to have the baby on the farm, as there is no-one to help her and the facilities in the house are not suitable for caring for a baby and mother. He would prefer them to live at home as it will be so much easier for his wife. He would also like to live in his home town, together with his ailing father (who has no-one to tend for the family house and no-one to look after him), and have the security of having all his and his wife's family around to help in times of trouble. He also realises that employment is very scarce in that region, and salaries are generally lower than here. The ideal for him would be to work here (in the Western Cape) for a few more years, saving enough money to go home and start either his own business or acquiring enough skills to find decent employment there.

Case 5: Permanent Female worker. Adopting farm.

Gloria earns about R3 000.00 a month and also receives an extra R1400.0 for looking after two family members who are in permanent ill health. If necessary she can borrow money from her colleagues at work. The family owns their fully furnished house as well as a property in Namaqualand.

Members of this household are convinced that the current government has done a lot of good for them. Gloria earns relatively more money than before 1994 and she feels that the new government has everything to do with it. As farm workers and people living in a rural area, they feel more secure and there is a feeling of being human. All the new labour laws in the agricultural sector are key to this safe and secure feeling (according to those working on the farm). Their neighbourhood is also safer now, as the streets are now being patrolled by the commando and members of the community who form the neighbourhood watch. This came as a direct result of the communities' complaints to the ANC about all the rape cases, murder cases and burglary.

All the new laws have led to them signing employment contracts with their employers and this also lends some protection/security to them. However, they are still very vulnerable and this is due to the fact that their education levels are so low. They are in no position to negotiate for better remuneration or promotion.

Gloria never went to school although she has attended some adult education classes. She would like to get a matriculation certificate as well as promotion, but realises though that promotion without proper education will not come very easily. Although she would love to hold a certificate in her hand, she gave up all the efforts in achieving this goal.

Very important to the adults in the household is the fact that they can now afford medical treatment, because it's free. Although it is not the quality service they would like, it's better than no treatment or medication at all. The household's social side needs improvement, but on the financial side they are doing much better.

The most important change for the household is that they have more money to spend. Life is much better for the household after 1994. Although the family has more money in the household now, they feel that an even better wage would make life much easier.

4.5. Communities

If not on households, have codes of practice had an impact on 'communities'? The answer to the question depends to some extent on what is meant by 'community'. In the context of this study one could think of at least four possible meanings: firstly, the farm worker community resident on a single farm; secondly, the loose collective of farm worker households residing on a number of farms belonging to the same co-op; thirdly, people living in a rural town from which seasonal labour is sourced and lastly, a whole wine region (e.g. Worcester) or parts thereof (e.g. Rawsonville).

As concluded above, codes of practice in the Cape wine lands have had a direct, visible impact on only one of five code adopting companies (i.e. a big co-op cellar and its member farms). However, one could argue that codes have helped to define a change agenda in three regions investigated by this project, viz. Robertson, Slanghoek-Rawsonville near Worcester and Olifantsriver. In all three regions codes have been discussed by regional bodies (e.g. the Robertson Wine Valley committee) and have even

prompted action, although not necessarily in the name of the ETI, WIETA or any other code. For example, the Lutzville co-operative in the Olifantsriver region has become a member of WIETA, not only because the client demands it, but also because the ETI code has had a presence in the region since 1999 and its big neighbour (i.e. the adopting co-op in our sample) has demonstrated that social responsibility and commercial success are not mutually exclusive. Thus, if workers' lives in these regions change for the better over the next few years, it is also because the codes have provided a clear, simple benchmark. In that sense they will have an effect of whole communities.

5. CONCLUSIONS AND RECOMMENDATIONS

From data gathered over three years it is clear that workers – both permanent and casual – employed at code adopting farms in the Cape wine lands are better off than their counterparts at non-adopting companies. This is particularly the case for permanent workers.

However, only in the case of one out of five adopting companies can improvement be directly attributed to the adoption of the code (although this involved a big number of co-op farms). In three out of the four remaining cases, social responsibility preceded code adoption, which merely put a symbolic seal on something that was already in place. Suppliers' attitudes are fundamental in accounting for relative impacts following code adoption. Where adoption is externally imposed it is less likely to be far-reaching or effective in improving worker livelihoods. In the case of adopter no. 5, no visible improvement could be detected. This highlights a potential weakness in codes of practice; viz. adoption needs to be backed up by proper auditing.

Casual workers at code-adopting farms are better off than their counterparts at non-adopting, but the gap between casual and permanent status is growing. The market demand for improved quality is leading to a parallel investment in skills training for a shrinking specialised core of permanent (mainly male) employees, while the drive to cut costs in the face of increasing international competition promotes the use of more cheaply employed casual workers for unskilled tasks. It is unlikely that codes could be extended to casual workers on a scale significant enough to address these growing distinctions.

- 1. Researchers, donors and the South African government should continue to investigate the impact of codes as they spread further throughout this industry and to explore and pilot other approaches to promoting worker livelihoods and empowerment.**
- 2. Retailers and donors to support improved training of suppliers and buyers.**
- 3. Code bodies to encourage industry wide exchange of suppliers' experience with code implementation.**
- 4. Researchers, donors and the South African government should establish the potential benefits of fair trade schemes in the wine industry over and above the adoption of minimum standards, as well as the opportunities in organic wine.**
- 5. NGOs, trade unions, donors, developing country governments should support the empowerment and organisation of casual workers.**

Worker awareness of codes of practice - their purpose, scope and content - is limited. A clear problem that emerged from the research is code awareness, communication and integration into day-to-day company practice. If codes are not kept 'alive' as part of a more transparent and participatory management style and built into a management system, they will fade and workers and managers alike will forget about them. For this reason it is vital that codes are not defined as a management issue, but that workers and their representatives, both at the cellar and on the farm, are properly trained in their implementation and monitoring. Codes should be sufficiently flexible across international boundaries to accommodate the needs prioritised by workers. To support this there is a need for building capacity of worker organisations and the level of worker representation. Also, in order to sustain motivation and commitment, commercial success flowing from adoption needs to be communicated to all employees of the company.

- 6. Further efforts are needed to improve worker awareness of codes of practice and labour laws, so that these are communicated in the workplace and integrated into day-to-day company management practice.**
- 7. Given the context of poor levels of worker representation and risks to worker rights, Donors, retailers, and suppliers, in collaboration with NGOs and worker organisations should pilot projects to build worker awareness of the implementation and monitoring of codes and labour laws, drawing on different media and learning from experience elsewhere in the world.**
- 8. Code bodies, donors, civil society should ensure that the priorities and knowledge of workers feed into the code formulation process and into the monitoring of compliance, via continued evolution of participatory social auditing and advocacy.**
- 9. Donors, NGOs, code bodies, trade unions and developing country governments should find ways to support the participation and empowerment of workers, for example, in researching different options, piloting dialogue with progressive managers and building the capacity of worker organisations.**
- 10. Suppliers should communicate information on business performance in export markets since the adoption of codes, to all company employees.**

The establishment of WIETA in 2002 and its growth to a total of 77 members since then, must in itself be counted as a significant impact. Despite difficulties like a 'code overload' and a multitude of competing codes, there are signs that the adoption of codes in the Cape wine industry is gaining further momentum. Even if this takes the form of the Fair Trade label for instance, and not WIETA, this will be due not least to the pioneering work done by the ETI pilot.

- 11. Donors and researchers should track the development of such local bodies in terms of how well they are able to: a) improve worker livelihoods; b) how far they can improve the effectiveness of auditing; c) improve worker and civil society participation in code development, auditing and activities for worker empowerment; d) whether they increase their membership and the reach of codes; e) their potential limitations in terms of worker**

empowerment; f) their performance in comparison to similar bodies in other industries and compared to alternative approaches to improving worker livelihoods.

- 12. NGO, trade union and donors should support training for workers and worker representatives at cellars and farms to facilitate their participation in bodies such as WIETA that aim to improve worker conditions and to develop locally appropriate and cheaper auditing and monitoring mechanisms.**

The history of codes of practice in the Cape wine industry shows that adoption will proceed more rapidly and commitment will be more sustainable, if retailers who insist their suppliers comply with ethical labour codes, share in the costs involved. Conversely, codes will grow in popularity if the returns on investment in codes 'come back to the farm gate'. Although an increasing number of farmers and cellars are embracing codes, the main motivation is to secure market entry. If ethical commitment could be linked to clear financial incentives, codes of practice would spread much faster and would be adopted more fully and enthusiastically by farm owners and managers. At present, retailer purchasing practices undermine suppliers' efforts and support for improving worker conditions and are a disincentive for suppliers to adopt codes. Furthermore, South African farmers and companies feel that retailers are inconsistent in what they require of suppliers in different parts of the world.

- 13. For code implementation to have a real impact, changes are needed in the purchasing and business practices of retailers. Donors, NGOs and the research community to support research on how to reform the governance of the buyer-driven value chain.**
- 14. Training for buyers is important and NGOs, researchers and donors could provide financial and technical support to retailers in piloting different approaches and developing concise private sector-targeted training materials and courses etc.**
- 15. Retailers should wholeheartedly support initiatives such as WIETA, including providing financial support to help reduce auditing costs for suppliers and make auditing more appropriate to local conditions and worker priorities.**
- 16. Donors should lobby for retailers to change their purchasing practices, share certification costs, and support the development of local code bodies.**
- 17. Retailers to be consistent in requiring suppliers worldwide to implement codes of practice, extending the uptake of codes, and crucially, imposing penalties for non-compliance. Donors and civil society to lobby for such consistency.**

Export agriculture in South Africa was already in a process of transformation prior to the introduction of codes, but the ethical trade debate has positively contributed to momentum for change in the industry. The introduction of codes of practice into the Cape wine industry some six years ago has helped to create a climate of change and has focused the debate on social change and human development. Although existing codes do not exceed local labour legislation, they can take credit for telling exporters in clear

terms what the most important foreign markets require in terms of labour, health and environmental standards. Such an orientation did not exist before 1998.

18. Donors to find ways to support continued momentum for embedding minimum standards and finding alternative strategies for worker empowerment. Funding for initiatives to enable dialogue between workers and suppliers, buyers and retailers together along the supply chain could help workers increase their voice and influence.

Finally, in order to maximise learning from the implementation of codes, integrated monitoring and evaluation is required.

19. Code bodies, retailers and suppliers to develop monitoring and evaluation systems for learning about change, in collaboration with NGOs, worker organisations, trade unions etc. Local civil society stakeholders to be involved (researchers, NGOs, trade unions, worker representatives) to provide a level of independence.

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Annex 1: Comparison of the ETI and SA8000 codes

Criterion	Comparison between ETI/SA8000
Forced labour.	Both codes prohibit the use of forced labour and the practice of lodging deposits or identity papers with employers. The use of forced labour is a criminal offence under the Basic Conditions of Employment Act. If such labour is used in the South African wine industry, it is extremely rare.
Discrimination:	Both codes prohibit discrimination in hiring, compensation, access to training, promotion, termination or retirement based on race, caste, national origin, religion, age, disability, gender, marital status, sexual orientation, union membership or political affiliation. All of these requirements are covered under the South African Employment Equity Act of 1998. While most wine cellars comply with the law, adherence on wine farms is poor. Discrimination in remunerating women appears to be widespread but farmers often justify lower wages by claiming that women work shorter hours and do less strenuous work. Black workers often find difficulty finding work on farms in Western Cape, where the majority of workers are coloured.
Harassment or Abuse:	The codes prohibit physical abuse and discipline, verbal abuse and threats, and sexual and other harassment. Anecdotal evidence suggests that some farmers continue to harass and abuse their workers.
Child Labour:	Both codes prohibit all child labour under the age of 15 or the national legal minimum, whichever is greater. Young people between the ages of 15 and 18 must be put on light duties and be given sufficient opportunity to further their education. The codes require employers to identify and fund a remediation programme that allows previously employed children to catch up with their schooling. The South African Basic Conditions of Employment Act (BCEA) makes employing children under the age of 15 a criminal offence. The only incidence of child labour on wine farms that I heard of occurs when children of farm workers help their parents out of school hours. This is not necessarily done with the knowledge of farmers. The practice of directly employing children was unknown to the people I interviewed during my research.
Freedom of association and the right to bargain collectively:	Under both codes, companies are expected to respect workers' rights to join trade unions and to bargain collectively. These rights are protected in South Africa's Labour Relations Act of 1995. Trade union activities are controversial in the wine industry. Most farmers and cellar owners believe that the majority of unions are poorly organised and do little for their members other than collect union dues. At least a portion of wine industry workers would agree and, partly as a result of this, the extent of unionisation remains low. However, farmers may also deliberately withhold information on unions from their workers in the hope of maintaining "paternalistic" relationships
Wages and other compensation:	Compliant companies must provide remuneration for a standard working week that meets industry or national minimums, and regardless, is sufficient to meet basic needs and provide some discretionary income. The term "living wage" is often used in this context. Clear and regular documentation on wages and deductions should be provided to workers, and deductions for disciplinary reasons are prohibited. Under SA8000, auditors are expected to apply a "food basket cost" formula for calculating the living wage. ETI has yet to define a methodology for calculating a living wage, although has published a discussion paper. There are currently no wine industry or agricultural minimum wages in South Africa. However, agricultural minimum wages will soon emerge as a result of negotiations between government, civil society and the industry. Wages on many wine farms are undoubtedly low, but the government is unlikely to set high agricultural minimum wages for fear of distorting local labour markets and creating more unemployment. By contrast, wages in wine cellars are generally regarded as meeting "living wage" levels.
Hours of work:	Companies are required to comply with national laws or industry standards, whichever provides the greatest protection. Regardless, a standard working week should not be more than 48 hours and overtime should be voluntary and not exceed 12 hours per week. One day a week should be free of work. South African legislation contained in the BCEA is more strict than the ETI and SA8000 codes. Normal working weeks should not be more than 45 hours and the maximum amount of overtime per week is 10 hours. The act does however allow employers to request temporary exemptions from these limits in exceptional circumstances. Wine industry employers frequently apply for and receive exemptions due to the highly seasonal nature of their businesses. In general, farm workers work between 45 and 48 hours per week. Complying with overtime legislation on farms is particularly difficult given the variety of tasks that workers perform in scattered locations around the farm. Clocking in and out is not possible. Even if they do not comply with the letter of the law, progressive farmers comply with the spirit by compensating workers on mutually agreed terms.
Health and Safety:	The codes require safe and hygienic working environments, health and safety training, and, where provided, worker accommodation to be "clean, safe and meet the basic needs of the personnel". The South African Occupational Health and Safety Act is a comprehensive piece of

	<p>legislation that extends beyond the provisions of labour codes. Most wine industry employers meet the majority of requirements. South African law is not explicit on the quality of worker housing. Some guidance may be available from local authorities but no standards are binding. The state of worker accommodation in the wine industry varies widely. Depending on proximity to local towns, many cellars do not provide worker accommodation. Occasionally they help permanent workers to buy properties locally. Where cellars do provide housing, conditions are generally good. Farm workers are often provided with housing, although the standards tend to be low</p>
Employment relationship	<p>The codes require adherence to national laws and practices. Labour only contracting, apprenticeship schemes or informal arrangements should not be used to avoid legal and financial obligations. Most wine farms and cellars comply with the BCEA regarding their permanent workers. However, employment relations with casual workers (including the wives of permanent male farm workers) do not always comply with the law.</p>
Management systems:	<p>Here the SA8000 code is more explicit than its ETI cousin. It requires employers to implement formal systems and procedures for managing all aspects of labour relations, remuneration, contracts and welfare. The only piece of SA legislation that requires specific management procedures is the Occupational Health and Safety Act, under which employers are required to appoint a senior member of the management team as a health and safety officer and to develop a plan for improving procedures at the workplace.</p>

(Collinson, 2001)

Annex 2: Priority areas articulated by workers during participatory phase

Permanent women workers	Permanent men workers	Temporary workers (women and men)
<ul style="list-style-type: none"> • Higher wages • Better Housing: more space, tiled surfaces, water on tap, warm water, flush toilets, electricity, higher subsidies for electricity, regular maintenance • Improved education for children: higher school exit level, tertiary education, financial support by company • Job security: contracts • Participation: information on financial performance of company • Training: opportunities, formal courses, certificates • Better opportunities for promotion • Better recreational facilities • No alcohol abuse by men • Better day care facilities • More company support for empowerment project • Better personal relationship with partner and children • To be treated with respect and dignity by owner/management • Better transport to town • No hard physical work • Food rations 	<ul style="list-style-type: none"> • Higher wages • Training: opportunities, formal courses, certificates • Secure title to land: documentary proof • Shorter hours • Sponsors for seed, seedlings in order to cultivate vegetables on own land • Better housing: clean water, higher water pressure for gardens • Better opportunities for promotion • Job security: job description in contract • Training: continuous opportunities • Better health care: more frequent visits by doctor to farm • Improved education for children: higher school exit level • Day care: also after school • More interaction with management 	<ul style="list-style-type: none"> • Job security: permanent status, contracts • Better housing: more space, bath, hot water, more plugs • Own house/home • Better communication with management, opportunity to voice concerns, information on company performance • Training: continuous opportunities • Recreation: facilities other than sport-related • Inclusion: invitation to end-of-year function • Better remuneration: higher wages , same fringe benefits as permanent workers • Better relations amongst workers: amongst women, between temporary and permanent workers • Information: on labour rights

Annex 3: Profiles of participating companies

1. Code Adopting Companies (5)

Farm No. 1

The owner is regarded by many as one of the great innovators in the wine industry. After inheriting the farm from his father in the mid 1990s, he turned the farm into a model of the 'new' South African wine industry – commercially, environmentally and socially. Labels have proliferated and sales are going from strength to strength, both in Europe and the USA. Increasing sales are mirrored by expansion. In recent years he has acquired two additional farms, one in Malmesbury and one in Stellenbosch. At the original farm itself, a new cellar has boosted capacity.

On the social level this cellar has set new standards. Wages and housing are way above average, electricity is subsidized, crèche facilities and a nurse are provided and the union is recognized. It was only the second farm in the industry to launch an empowerment scheme. Today it continues to finance home ownership for those that retire from service.

Despite its socially progressive profile, there were tensions between management and the union in the late 1990s. Apparently these stemmed from the time when the owner's father still in charge. Mainly through the actions of the local union organizer a worker-management co-decision making body never got off the ground. Since then relations have improved and union membership has declined to less than 20%.

The farm adopted SA 8000 code in 2001. This year they switched to the WIETA code, because it is a 'local' code and costs less.

Farm No. 2

This farm is owned by a former Johannesburg executive and his wife. They bought what was by all accounts a run-down farm in the early 1990s. As a member of the Perdeberg co-operative, they immediately embarked on an uprooting and replanting plan, shifting the vineyards to red varieties. Blessed with good terroir, they deliver red grapes to one of the foremost private cellars in the region. A few years ago, they also started their own private cellar on the side, apparently with the consent of the co-operative. Recently the farm gave up its membership of the co-op. As a newly established private cellar they make their own wine and sell some of their grapes to other private cellars, including the one above.

When the present owners bought the farm they kept the existing workforce in their employ - much to their regret it seems. From the accounts of the owners, as well as the interviews it seems that at least half the workforce showed the classical signs of Cape wine farm pathology: low levels of education, isolated, poorly paid, alcohol abuse, poor work discipline, intra-community violence and domestic violence.

In their effort to improve the situation, they owners tried to create an incentive. Those that 'behaved' were given the new and better housing. Those that did not mend their ways, had to live in the 'bush', i.e. the poor hovels, situated somewhat apart from the others in a piece of eucalyptus forest, often without running water or toilets. However,

in the view of some members of the owning family, nothing seems to have improved. Year after year they complained bitterly about the irresponsibility, laziness and sheer deviousness of some members of the labour force.

Whether the industriousness and businesslike approach of the owners clashed head-on with the social pathology, or whether their seemingly futile efforts hardened their attitudes, is difficult to say. However, it is clear that they take a strict, not to say hard line attitude vis a vis their seasonal labour. The latter are recruited from Beaufort West, a biggish town in the Great Karoo some 500 kilometres from Cape Town, suffering from high rates of unemployment and widespread poverty. Many people are desperate and try to cobble together a livelihood as best they can. This may explain why the owners go such a distance to recruit workers for the grape harvest. Likewise, people from this region probably have fewer choices than even those living in shantytowns in and around Cape Town.

During the research period the farm saw at least one strike on the part of the seasonal workers. This had mainly to do with the kinds of working and remuneration arrangements which are structured in such a way that they favour the owners. For instance, part of the regular pay is held back until the end of the harvest. It is then paid out as a 'bonus'. However, if workers are dissatisfied and leave early, the money is withheld. As a supplier of grapes to one of the adopting farms in this study, this farm was expected to comply with the code. However, some of the housing would probably not stand up to the standards of decent housing, while some of the employment arrangements, would probably qualify as 'forced labour' – something that is anathema to most codes of practice, including that of WIETA.

Farm No. 3

This run down farm near in the Paarl region was snapped up by a French speaking Swiss national who clearly had a business plan when he took the step. Like some of the other code adopters in our study he developed the farm on a parallel track – a commercial and a social one. The supply chains to Switzerland and other parts of Europe were already in place when labels with a clear African identity came on stream. After leasing vinification facilities in Stellenbosch and Worcester for the first ten years or so, the company's brand new on-farm cellar became operational two years ago. The wine business is complemented by wine tourist office and a guesthouse at the farm.

An interesting feature of the company culture is the fact that so far both CEOs have been French speaking nationals. From this it would appear that the owner has more faith in his compatriots than local managers to execute his vision and business plan. A central part of this vision is people and community development. Right from the start the company launched a community property association (CPA) which includes all permanent workers, a vineyard and is primarily financed from proceeds of a wine with the same name. The CPA also finances the upgrading of the housing stock, a provident fund and children's education. Beyond the farm itself, the company is the main driving force behind an educational initiative for children in the immediate vicinity.

The farm is a member of WIETA.

Farm No. 4

The owner is an entrepreneur who first made his money in the coal industry before he moved into horse breeding and wine. After picking up the farm as somewhat of a bargain in the early 1980s, it has developed into one of the elite cellars in the industry. It exports most of its wine to the UK and Europe, but is also making great strides in the US market. The farm's grapes are supplemented by a farm and cellar in Franschoek. The owner lives mainly in London and has developed business interests in the local yachting industry and horse breeding in Kentucky.

By the time the farm agreed to take part in the ETI pilot, a social responsibility programme was already in place⁴². Compliance with local labour legislation is a matter of course. Nothing less is expected from labour contractors providing services to the farm. A unique feature is the social support allowance given to single mothers. The company also devotes considerable time and money to the education and training of its employees and their children. In the planning stages are a training centre which will not only benefit the farm's employees, but the region at large. Already members of management are playing a leading role in a broad social development initiative in the area.

Farm No. 5

A member of a co-operative⁴³, this farm is in many ways a stark contrast to the most progressive adopters described above. Located in a historically conservative region (i.e. Olifantsriver), the co-operative was essentially forced to adopt the ETI code by representatives of supermarkets like TESCO. At the time (i.e. 1999) at least half the members were opposed to what was regarded as 'outside interference'. However, the then CEO told the meeting that they had a very simple choice: either adopt or no listing.

Whether the owners of this farm were amongst those that put up resistance is not clear. What is clear is that the farm was in a precarious position. Saddled with the wrong cultivars, the farm was making little money in the second half of the 1990s - to the extent that the owner left the farming operation and sold insurance for a while. Survival was only made possible by a new venture, viz. a cucumber greenhouse which, in time, helped to finance the transformation of the vineyards. Today both the farm and the co-operative are doing well financially, the former largely because of the vegetable side of the business. The owners have started a little private cellar on the side. The co-op itself is doing very well in the UK market. Two of its labels are among the top SA brands in the UK.

However, commercial success is where the similarity with the trailblazing adopters ends. Unlike the latter, this farm had to be dragged into the new era of labour rights and standards, essentially because of hard, traditional attitudes on part of the owner. Even today relations between the latter and workers are strained. As recently as two years ago, the owners cut all fringe benefits after the government introduced the minimum wage in agriculture. In a highly unusual arrangement seasonal workers are expected to pay for transport between town and farm.

⁴² The owner's wife is mainly credited for this.

⁴³ After the merger with neighboring Spruitdrift co-op in 2002 the cellar markets itself abroad as 'Westcorp International'.

2. Non-adopting Companies (11)

Farm No. 6

The owner is an entrepreneurial, dynamic personality and highly influential in the Worcester area. Traditionally Worcester is a conservative region. He owns two farms: one is a member of the local co-operative and the other a private cellar. Most of the wine produced at the latter goes to retailers in the Netherlands.

While he continues to play the role of catalyst for change in the region, he has been steadily expanding his own business. The latest additions are conference facilities and a restaurant.

The workers seem to benefit from the enlightened attitude of their employer. Every time we met them, they seemed at ease and without fear of victimization.

Farm No. 7

Our experience of this farm is full of contradictions. On the one hand we met workers with some of the lowest material standards of living, including housing. At the beginning of the project some workers told us that they had to fetch water from an open ditch and relieve themselves in the open field. Some of them had the most meagre possessions we have come across. Amongst the casuals were people from as far away as Britstown in the Great Karoo. They were so desperate for work that they had jumped onto the foreman's pickup and made the ten hour journey on the back of the open vehicle.

On the other hand we discovered that the farm had launched an empowerment scheme (i.e. equity share) around the time when our research commenced in 2002. In that sense the company was playing a pioneering role, especially in a region like Olifantsriver. Four years on the workers involved in the scheme are already starting to benefit from the venture. Some of the proceeds are going to be used to finance worker housing on a nearby piece of land received from the owner as a gift. Apparently the latter did not want to spend any more money on the existing housing stock once the decision had been taken to launch the new scheme.

Grapes grown on this farm form a small part of the total operation. In terms of turnover, it is mainly a market tomato business, taking in another farm some distance away. Be that as it may, the grapes themselves are delivered to the Lutzville co-operative. Last year the latter joined WIETA, but had not been audited at the time of writing.

Farm No. 8

This company is a private cellar owned by a businessman who made his money through transport contracts for the South African army while the guerrilla war was going on in Namibia/Angola during the 1980s.

The capital generated in this way was used to set up a state of the art cellar near Somerset West and to recruit one of the top Cape winemakers. The flagship red sells at R 180 a bottle. Approximately 30% is exported.

Modernisation of the farm does not stop at the vineyards and the cellar. The company sports some of the best worker housing we have seen – solid, spacious, electricity, warm water and all of this well maintained. All the workers hail from Robertson. For them the move to this farm was a huge step forward. In Robertson they lived isolated lives some distance outside town, in poor housing and bound up in a more ‘traditional’ employment relationship. In our interviews they appreciated the close proximity to town and shops and the better working conditions.

The winemaker also manages the farm. He is the current chair of the Cape Winemakers’ Guild.

Farm No. 9

This farm just outside Stellenbosch has been family owned for two generations. It belongs to a co-operative cellar that produces mainly red wine, most of which is delivered to a producing wholesaler in terms of a long term contract. Recently the cellar had a complete facelift, including a name change. This was mainly motivated by a first venture into foreign markets. It now sells some 10% of its wine to a Dutch retailer.

However, for the owner of this farm this is not the first exposure to foreign markets. The lion’s share of his revenue comes from berries which he sells to British and European supermarkets. For this part of his operation he has to comply with Euregap standards.

The relationship between owner and employees could be described as neo-paternalist, which includes compliance with local labour legislation. During the grape harvest extra labour is sourced from a labour contractor who employs mainly African workers.

Farm No. 10

This business is a big commercial operation which includes three farms, wine tourism and a restaurant. It is involved in a joint venture with the second biggest producing wholesaler in the industry. The farm itself could be described as a case of ‘company farming’, where relations are more formal, bureaucratic and impersonal. Because of lengthy chains of command, it was never easy for us to arrange interviews.

In the 1980s this old Cape family farm was bought for a ‘record price’ by a foreign ex banker. The new housing build for the employees set new standards for the Cape. Ironically, this did not prevent him being targeted by the unions. In fact, he may have been targeted precisely because this was now a high profile farm. Since then labour relations at the farm have had an unstable history.

The farm has a Human Resource manager. At the beginning of the project she had no knowledge whatsoever of codes of practice. Now the company is a member of WIETA.

Farm No. 11

This farm is a member of a former co-operative, turned private cellar. However, the farm itself is a fairly small operation, employing only five permanent workers.

The owner is a director of the new company. At the beginning of the project he had no awareness of codes of practice. When asked for his opinion, he was not opposed to codes in principle, but thought that they should not only be required from South African suppliers, but from everybody that sells wine to British supermarkets. Despite the fact that the cellar sells substantial volumes of wine to British retailers, it has not yet deemed it necessary to join WIETA. Instead it implements BRC, HACCP and ISO standards.

Farm No. 12

The present owner is a former officer of the South African Defence Force who took over the farm when his father retired at the beginning of the 1990s. He is also a director of the co-operative to which he delivers his grapes. Most of the co-op's wine is sold in bulk to a producing wholesaler in terms of a longterm contract. As a result, neither the cellar nor the owner of the farm is directly exposed to the market.

The farm itself is a mixed operation which grows wheat in addition to grapes. However, the latter have been expanded on a big scale over the last ten years and more plantings are in the offing. In addition to grapes and wheat, the owner is trying to establish a game hunting venture on the farm.

In his relations with the workers, the owner tends towards the conservative side. Nevertheless, there is a desire to be informed on latest developments in the industry, including a curiosity regarding codes of practice.

Farm No. 13

Jointly managed by two brothers, this is a big grape and wheat operation. The grapes are delivered to a nearby co-operative which does very well commercially. Although very little of its production is bottled, the cellar provides both white and red wine to Vinfruco, the owners of 'Arniston Bay', one of the biggest sellers in the UK market. The co-op itself is a member of WIETA.

However, relations on the farm itself seemed tense. Right to the end we got the impression that the farmer was suspicious about the project. During the harvest the farm makes use of a labour contractor who employs mostly African women and men.

Farm No.14

This is an estate winery in the Robertson region. It is managed by two brothers, one of whom plays a prominent role in the region's collective projects. The latter told us that codes had been discussed at meetings of the 'wine route' body, but that it had been decided to leave adoption over to individual companies, partly because of the confusing multitude of codes. By the latest count (i.e. December 2004), four Robertson cellars had joined WIETA. This does not come as a complete surprise. Although previously a rather conservative region, Robertson now exhibits a greater collective spirit than many a region closer to Cape Town.

Farm No.15

The owner used to be a member of a co-operative, but broke away to establish his own estate winery. He went one step further. As he is not on the main Robertson tourist route, he set up a shop for his wines in town itself. However, most of the wine is sold to wholesalers.

In our interviews with the workers we got the impression that the owner runs a rather conservative regime. Workers used to complain a lot, both about their wages and their housing, saying that the owner had a tight fist, despite the fact that the business was visibly getting ahead.

Farm No. 16

This farm is a case study of old style paternalism getting buried by its own contradictions. Having been used to set wages and working conditions unilaterally for many years, the break in trust and relations came when the owners failed to adjust wages to the new minimum levels in agriculture which became operational in March 2003. When the workers reminded their employer months later, he still refused to take the necessary step. When the workers joined the union, he and his sons became highly annoyed and angry. Having been exposed they eventually did pay the new wages, but in revenge cut all the fringe benefits which they had hitherto contributed on their own accord. In the owner's own words: 'All these years I was their father. When they joined the union, I told them: "They are your father now, let them look after you"'.

By the time we did the last monitoring round the break in trust had not been repaired. Not only that. After the farm had been unionized it became more difficult for us to do the research. Apparently the farmer's sons thought we were responsible for the workers joining the union.

Annex 4 Questionnaires

Questionnaire No.

University of Stellenbosch & University of Greenwich

Impact Assessment of Codes of Practice

WORKER QUESTIONNAIRE

Introduction

This research project tries to assess whether 'labour' codes like the ETI base code, which have been introduced on some Cape wine farms over the last three years, have any impact on workers' lives. In order to do this, we first have to assess workers' current position with regard to income, working conditions, housing and a number of other questions. We appreciate your co-operation in this regard and want to assure you that all information will remain **confidential**.

Name of researcher: _____

Date of interview: _____

1. Company name: _____

2. Code

1. Adopter
2. Non-adopter

3. Interviewee: _____

4. Language

1. Afrikaans
2. Xhosa

5. Work status

1. Permanent
2. Temporary
3. Temporary contract
4. Seasonal
5. Seasonal contract

A. HOUSEHOLD (includes all people that usually live and prepare food together)

	6. Age status 1. adult 2. child younger than 7 3. Child between 7-15	7. Gender 1. female 2. male	8. Highest educational qualification	9. Economic status 1. income 2. no income	10. Source of income 1. paid employment 2. farm produce 3. non-farming enterprise 4. remittances 5. state transfers	11. Income p.m.
1. Resp.						
2						
3						
4						
5						
6						
7						
8						
9						

B. HOUSING, SERVICES AND ASSETS

12. Type of house

1. formal (brick)
2. informal

13. Who owns the house?

1. employer
2. another person
3. municipality
4. I
5. I and my partner

14. Cement floors

1. yes
2. no
3. only some rooms

15. Ceiling

1. yes
2. no
3. only some rooms

16. No. of rooms:

17. Cooking and sleeping areas separate

1. yes
2. no

18. Electricity for

1. lights
2. cooking
3. heating
4. warm water
5. lights and cooking
6. lights and heating
7. lights, cooking and heating
8. lights, cooking, heating and warm water
9. none

19. Do you pay for electricity?

1. yes
2. no
3. partially (subsidized by employer)

20. Piped water into home or plot

1. yes
2. no

21. No. of minutes to water source: _____

22. Washing facilities

1. basin
2. shower
3. bath
4. basin and shower
5. basin and bath
6. basin, shower and bath
7. none

23. Sanitation
1. flush toilet
 2. chemical toilet
 3. pit latrine
 4. none of above

24. Which of the following assets are part of the household?

	ITEM
1	Stove
2	Cooker
3	Refrigerator
4	Tables
5	VCR
6	PC
7	Chairs
8	Sofa set
9	Beds
10	Mattress
11	Sewing/knitting machine
12	Kitchen utensils
13	Household tools
14	Dishes
15	Cutlery
16	Radio
17	Television
18	Bicycle
19	Motorcycle/scooter
20	Car/truck

25. Who in the household decides on the purchase of bigger (durable) items?
1. I
 2. my partner
 3. I, together with my partner
 4. all adults in the household together

C. INDICATORS

C.1 MATERIAL WEALTH

26. What is your job?
1. general worker
 2. driver
 3. specialist worker (e.g. irrigation, fencing)
 4. general worker & plus specialist tasks (e.g. welding)
 5. supervisor
27. Cash wage per week (before deductions): R _____
28. No. of hours worked per week (excluding overtime) _____
29. Can you choose whether you want to work overtime?
1. yes
 2. no
30. How many years have you worked for this employer? _____

31. Over the last two years, how many training courses have you attended paid for by the company?

32. Do you have a written contract?

1. yes
2. no

33. If yes, do you understand it?

1. yes
2. no

34. Are you in debt to

1	Employer/manager
2	Farm shop
3	Friends/colleagues
4	Bank
5	Shop(s) in town
6	Cash loans
7	Combination

35. On this farm, will the owner/manager allow you to stay in the house if you lose your job?

1. yes, indefinitely
2. yes, for a short period
3. depends on how one loses job
4. no
5. don't know
6. not applicable

36. Are you a member of the farm's equity share/social empowerment scheme?

1. yes
2. no
3. not applicable

37. If yes, has it made a difference to your life on the farm?

1. yes
2. no
3. partly

38. If yes or partly, how?

39. Does your employer provide free transport between farm and town?

1. yes
2. no

40. If yes, how many trips per week? _____

C.2 SOCIAL WELL-BEING

41. Is alcohol abuse causing problems in the relationship with your partner?

1. yes
2. no
3. not applicable

42. Is there violence in your home?

1. yes
2. no

43. Does the owner/manager provide you with alcohol?

1. yes
2. no

44. Does the owner/manager provide protective clothing when you have to work with pesticides?

1. yes
2. no

45. Does your employer subsidise your medical care?

1. yes
2. no

46. If yes, in what way?

47. Does the company provide training on HIV/AIDS?

1. yes
2. no

48. Is there day care on this farm?

1. yes
2. no

49. Do your children go to day care?

1. yes
2. no
3. not applicable

50. If no, why not?

51. Does the company subsidise the school education of your children?

1. yes
2. no
3. not applicable

52. If yes, how?

C.3 EMPOWERMENT

53. Have you heard of labour codes on Cape wine farms like the ETI code or SA 8000?

1. yes
2. no

54. If yes, what do you know about them?

55. Does the owner/contractor/manager/supervisor threaten or swear at you?

1. never
2. sometimes
3. most of the time
4. always

56. Does the owner/contractor/manager/supervisor abuse you physically?

1. never
2. sometimes
3. most of the time
4. always

57. Is there a workers' committee on this farm?

1. yes
2. no

58. If yes, has it made a difference to your working life?

1. yes
2. no

59. If yes, how?

60. Does the owner/manager allow you to take up a job somewhere else, but remain living on the farm?

1. yes
2. no
3. not applicable

61. Can you keep your job on this farm, even if your partner was to resign or lose his job?

1. yes
2. no
3. don't know
4. not applicable

62. Do any of your children (younger than fifteen) work on this farm?

1. yes
2. no
3. not applicable

63. If yes, why?

1. employer expects them to
2. they have to supplement the household income
3. they no longer want to attend school

64. Are you a member of a trade union?

1. yes
2. no

65. If yes or no, why?

66. Do you know what an NGO or Advice Office is?

1. yes
2. no

67. If yes, can you describe what it is?

68. Over the last two years, how many visits have you paid to the local Advice Office or NGOs? _____

THANK YOU FOR YOUR TIME AND COOPERATION!

University of Stellenbosch & University of Greenwich

Impact Assessment of Codes of Practise

OWNER/MANAGER QUESTIONNAIRE

Introduction

This research project tries to assess whether ‘labour’ codes like the ETI base code, which have been introduced on some Cape wine farms over the last three years, have any impact on companies and workers’ lives. More specifically, we would like to know whether

- whether social investment is working
- how codes make a difference to workers and companies and
- whether there are things about codes that could be improved

The purpose is not to assess compliance with the codes. Also, the research is not a judgement of any specific company or of the industry per se.

We appreciate your co-operation in this regard and want to assure you that all information will remain **confidential**.

Joachim Ewert & Valerie Nelson (082 335 4808)

Name of researcher: _____

Date of interview: _____

1. Company name: _____

2. Code

3. Adopter
4. Non-adopter

3. Interviewee

1. Owner
2. Manager
3. Owner-Manager

4. Name of Interviewee: _____

A. COMPANY PROFILE (ALL COMPANIES)

5. Type of company

1. estate
2. private cellar
3. cooperative farm

6. No. of hectares under cultivation? _____

7. No. of hectares under grapes? _____

8. No. of tons of grapes produced (2002)? _____

9. To whom do you sell your grapes?

Sales to	%
1. Cooperative	
2. Wholesaler	
3. Estates or private cellars	
4. Other	
5. Not applicable	

10. To whom do you sell your wine?

Sales to	%
1. Domestic market	
2. Exports	
2.1 supermarkets	
2.2 other	
3. Not applicable	

11. To which markets do you export?

Exports to	%
1. Europe (incl. UK)	
2. USA	
3. Asia	
4. Other	

Composition of the labour force

Year	12. Permanent Men	13. Permanent Women	14. Temporary ('casual') Men	15. Temporary ('casual') Women	16. Seasonal Men	17. Seasonal Women	18. Total
2002							

What is the average wage per week for the following categories of workers?

Average Wage p.w. Rs	19. Permanent Men	20. Permanent Women	21. Temporary ('casual') Men	22. Temporary ('casual') Women	23. Seasonal Men (harvest only)	24. Seasonal Women (harvest only)
2002						

25. Do you make use of labour contractors?

1. yes
2. no

26. If yes, how are they paid?

1. commission per worker recruited
2. amount per ha or ton
3. lump sum for job

27. What are the most important challenges facing this business?

28. How do these challenges impact on the company's workers? (does it require the upgrading of skills, for example?)

B. FOR NON-CODE ADOPTING COMPANIES ONLY

29. Have you heard about labour codes on Cape wine farms like the ETI code or SA 8000?

- 3. yes
- 4. no

30. If yes, what do you know about them?

31. What are the positive aspects of these codes?

32. What are the negative aspects of these codes?

33. In your view, what factors determine whether a company adopts a code or not?

C. FOR CODE ADOPTING COMPANIES ONLY

34. In which year did the company become part of the ETI pilot/get accredited as an SA 8000 company?

35. What are the positive aspects of these codes?

36. What are the negative aspects of these codes?

37. In your view, what factors determine whether a copy adopts a code or not?

38. Does the implementation of the code affect your marketing strategy in any way?

- 1. yes
- 2. no

39. If yes, how?

40. Did the company make any important social investments in its labour force before 1999/2000?

- 1. yes
- 2. no

41. If yes, what kind of investments?

Have there been any important changes regarding the company's labour force (terms of employment, conditions of work) since 1999/2000?

Provision	Changes
42. Forced labour	_____ _____
43. Discrimination	_____ _____
44. Harassment or abuse	_____ _____
45. Child labour	_____ _____
46. Freedom of association and the right to bargain collectively	_____ _____
47. Wages and other forms of compensation	_____ _____

48. If yes, which have become about because of the code?

49. What have been the main costs in terms of implementing codes?

50. Which is a greater cost in terms of adopting codes?

1. the management costs involved
2. specific investment costs in housing, wages etc?

51. Did you inform the workers about the implementation of the code on this farm?

1. yes
2. no

52. If yes, how?

53. Are there important social issues on the farm which are not covered by the code?

1. yes
2. no

54. If yes, what are these issues?

55. How should these issues be addressed?

56. Are you considering de-listing from the codes?

1. yes
2. no

57. If yes, why?

THANK YOU FOR YOUR TIME AND COOPERATION

Annex 5: Analysis of baseline and monitoring cycle data

1. Comparing permanent workers at adopting and non-adopting companies

Table 1: General profile

	Adopters Baseline 2002	Non-Adopters Baseline 2002	Adopters 2004	Non- Adopters 2004
Women as % of total workforce	45.8	22.8	33.3	15.0
Percentage Afrikaans speakers	96.6	91.1	95.2	92.5
Percentage of workers whose partner is also employed on the farm	67.8	59.4	71.4	62.5
Percentage of workers who have completed five years of schooling (i.e. are literate)	72.9	54.5	71.4	57.5
Average no. of years spend at school	7.03	5.38	6.95	5.38
General workers as % of total workforce	61.0	71.3	61.9	70.0
No. of people in household	3.86	3.83	4.38	4.30
No. of income earners in household	2.19	2.23	2.38	2.35

Table 2: Housing

	Adopters Baseline 2002	Non- Adopters Baseline2002	Adopters 2004	Non- Adopters 2004
Percentage of total workforce who live off-farm	11.9	6.9	23.8	10.0
Percentage of total workforce who live in formal (i.e. brick) housing	98.3	97.0	100.0	95.0
Percentage of total workforce whose houses have ceilings	72.9	83.2	66.7	77.5
Percentage of total workforce whose houses have electricity for lights, cooking, heating and warm water	44.1	25.7	52.4	25.0
Percentage of total workforce who have to pay for all electricity	17.9	43.6	42.9	37.5
Percentage of total workforce who have piped water into their plot or home	86.4	88.1	81.0	77.5
Percentage of total workforce whose houses have a wash basin and bath or shower	39.0	30.7	42.9	30.0
Percentage of total workforce whose houses have a flush toilet	81.4	73.3	90.5	75.0

Table 3: Material wealth

	Adopters Baseline 2002	Non-Adopters Baseline 2002	Adopters 2004	Non- Adopters 2004
Cash wage per week (before deductions) Rand	280.86	257.33	361.83	268.45
Percentage of total workforce who possess their own home	4.4	6.0	14.3	7.5
Percentage of total workforce who have a stove	62.7	51.5	71.4	65.0
Percentage of total workforce who own a refrigerator	49.2	57.4	66.7	77.5
Percentage of total workforce who own a television set	59.3	61.4	85.7	70.0
Percentage of total workforce who own a car	18.6	5.0	19.0	10.0

Table 4: Social well-being

	Adopters Baseline 2002	Non- Adopters Baseline 2002	Adopters 2004	Non- Adopters 2004
Percentage of total workforce who think they will be allowed to stay on in farm cottage even if they lose their job	49.2	27.7	38.0	22.5
Percentage of total workforce who are given wine as part of remuneration	15.3	7.9	0.0	2.5
Percentage of total workforce who are provided with protective clothing when spraying pesticides	81.4	44.2	61.9	47.5
Percentage of total workforce whose medical care is subsidized by employer	79.6	55.1	57.1	35.0
Percentage of total workforce who are exposed to HIV/AIDS education through employer	45.8	25.7	90.5	42.5
Percentage of total workforce who have access to a crèche	98.3	60.4	90.5	50.0
Percentage of total workforce whose children's education is subsidized by the employer	28.8	12.1	4.8	10.0
Percentage of total workforce who never suffer verbal abuse by the employer	76.3	57.0	66.7	62.5
Percentage of total workforce who never suffer physical abuse by the employer	94.9	87.0	90.5	92.5
Percentage of total workforce who think their employer will not retrench them even if their partner loses hers/his	49.2	45.5	71.4	50.0
Percentage of total workforce whose children (under age 16) work on the farm	0.0	1.0	0.0	0.0

Table 5: Empowerment

	Adopters Baseline 2002	Non-adopters Baseline 2002	Adopters 2004	Non- adopters 2004
Percentage of total workforce who are in possession of a written employment contract	88.1	49.5	95.2	75.0
Percentage of total workforce who are indebted to the employer	22.0	15.9	23.8	25.0
Percentage of total workforce who are members of an empowerment scheme	8.5	3.0	19.0	0.0
Percentage of total workforce who are members of a trade union	5.1	10.9	4.8	22.5
Percentage of total workforce who are aware of codes of practice	45.8	13.9	28.6	32.5

2. Comparing women and men permanent workers at code adopting farms

Table 6: General profile

	Women Baseline 2002	Men Baseline 2002	Women 2004	Men 2004
Percentage of total workforce	45.7	54.3	33.3	66.6
Percentage Afrikaans speakers	100.0	93.8	100.0	92.9
Percentage whose partner is also employed on the farm	59.3	75.0	57.1	78.6
Percentage who have completed five years of schooling (i.e. are literate)	77.8	68.8	57.1	78.6
Percentage general workers	63.0	59.4	85.7	50.0
No. of people in household	3.78	3.94	4.14	4.50
No. of income earners in household	2.11	2.25	2.00	2.57

Table 7: Housing

	Women Baseline 2002	Men Baseline 2002	Women 2004	Men 2004
Percentage who live off-farm	11.1	12.5	16.3	28.6
Percentage who live in formal (i.e. brick) housing	96.3	100.0	100.0	100.0
Percentage whose houses have ceilings	70.4	75.0	71.4	64.3
Percentage whose houses have electricity for lights, cooking, heating and warm water	51.9	37.5	57.1	50.0
Percentage who have to pay for all electricity	7.7	26.7	42.9	42.9
Percentage who have piped water into their plot or home	92.6	81.3	71.4	85.7
Percentage whose houses have a wash basin and bath or shower	48.1	35.3	57.1	35.7

Percentage whose houses have a flush toilet	77.8	84.4	85.7	92.9
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Table 8: Material wealth

	Women Baseline 2002	Men Baseline 2002	Women 2004	Men 2004
Cash wage per week (before deductions) Rand	298.59	265.91	272.64	406.43
Percentage who possess their own home	3.7	6.2	14.3	14.2
Percentage who have a stove	70.4	56.3	71.4	71.4
Percentage who own a refrigerator	55.6	43.8	57.1	71.4
Percentage who own a television set	66.7	53.1	85.7	85.7
Percentage who own a car	14.8	21.9	14.3	21.4

Table 9: Social well-being

	Women Baseline 2002	Men Baseline 2002	Women 2004	Men 2004
Percentage who think they will be allowed to stay on in farm cottage indefinitely even if they lose their job	18.5	21.9	28.6	14.3
Percentage who are given wine as part of remuneration	18.5	12.5	0.0	0.0
Percentage who are provided with protective clothing when spraying pesticides	70.4	90.6	71.4	57.1
Percentage whose medical care is subsidized by employer	80.8	78.6	57.1	57.1
Percentage who are exposed to HIV/AIDS education through employer	59.3	34.4	100.0	85.7
Percentage who have access to a crèche	96.3	100.0	100.0	85.7
Percentage whose children's education is subsidized by the employer	33.3	25.0	14.3	0.0
Percentage who never suffer verbal abuse by the employer	88.9	65.6	57.1	71.4
Percentage who never suffer physical abuse by the employer	88.9	100.0	100.0	85.7
Percentage who think their employer will not retrench them even if their partner loses hers/his	40.7	56.3	57.1	78.6
Percentage whose children (under age 16) work on the farm	0.0	0.0	0.0	0.0

Table 10: Empowerment

	Women Baseline 2002	Men Baseline 2002	Women 2004	Men 2004
Percentage who are in possession of a written employment contract	88.9	87.5	100.0	92.9
Percentage who are indebted to the employer	14.8	28.1	28.6	28.5
Percentage who are members of an empowerment scheme	0.0	15.6	14.3	21.4
Percentage who are members of a trade union	3.7	6.3	0.0	7.1
Percentage who are aware of codes of practice	59.3	34.4	28.6	28.6

3.Comparing permanent women workers at adopting and non-adopting companies**Table 11: General profile**

	Adopters Baseline 2002	Non- Adopters Baseline 2002	Adopters 2004	Non- Adopters 2004
Women as % of total workforce	45.7	22.7	33.3	15.0
Percentage Afrikaans speakers	100.0	91.3	100.0	83.3
Percentage whose partner is also employed on the farm	59.3	65.2	57.1	83.3
Percentage who have completed five years of schooling (i.e. are literate)	77.8	43.5	57.1	50.0
Percentage of General workers	63.0	91.3	84.6	100.0
No. of people in household	3.78	4.09	4.14	3.67
No. of income earners in household	2.11	2.43	2.00	2.17

More Afrikaans speaking women are employed at adopting farms. They are slightly better educated and have better prospects of job mobility. Fewer of their partners are also employed at the farm.

Table 12: Housing

	Adopters Baseline 2002	Non- Adopters Baseline 2002	Adopters 2004	Non- Adopters 2004
Percentage who live off-farm	11.1	0.0	14.3	16.7
Percentage who live in formal (i.e. brick) housing	93.3	100.0	100.0	100.0
Percentage who houses have ceilings	70.4	91.3	74.1	66.7
Percentage who houses have electricity for lights, cooking, heating and warm water	51.9	26.1	57.1	33.3
Percentage who have to pay for all electricity	7.7	65.2	42.9	66.7

Percentage who have piped water into their plot or home	92.6	95.7	71.4	83.3
Percentage whose houses have a wash basin and bath or shower	48.1	52.2	57.1	33.3
Percentage whose houses have a flush toilet	77.8	82.6	85.7	100.0

On most indicators permanent women workers at code adopting companies enjoy better quality housing, including the provision of electricity. The latter is subsidised to a greater extent by the employer than is the case at non-adopting farms.

Table 13: Material wealth

	Adopters Baseline 2002	Non- Adopters Baseline 2002	Adopters 2004	Non- Adopters 2004
Cash wage per week (before deductions) Rand	298.59	174.57	272.64	192.50
Percentage who possess their own home	3.7	0.0	14.3	0.0
Percentage who have a stove	70.4	56.5	71.4	16.7
Percentage who own a refrigerator	55.6	60.9	57.1	66.7
Percentage who own a television set	66.7	69.6	85.7	50.0
Percentage who own a car	14.8	4.3	14.3	0.0

In all respects, ‘adopting’ women are materially better off. They own more durable goods, including cars. There is a R 90 difference in weekly wages.

Table 14: Social well-being

	Adopters Baseline 2002	Non- Adopters Baseline 2002	Adopters 2004	Non- Adopters 2004
Percentage who think they will be allowed to stay on in farm cottage indefinitely even if they lose their job	18.5	16.1	28.6	0.0
Percentage who are given wine as part of remuneration	18.5	13.0	0.0	0.0
Percentage who are provided with protective clothing when spraying pesticides	70.4	45.5	71.4	66.7
Percentage whose medical care is subsidized by employer	80.8	56.5	57.1	50.0
Percentage who are exposed to HIV/AIDS education through employer	59.3	21.7	100.0	33.3
Percentage who have access to a crèche	96.3	69.6	100.0	66.7
Percentage whose children’s education is subsidized by the	33.3	9.1	14.3	16.7

employer				
Percentage who never suffer verbal abuse by the employer	88.9	65.2	57.1	88.3
Percentage who never suffer physical abuse by the employer	88.9	93.1	100.0	100.0
Percentage who think their employer will not retrench them even if their partner loses his	40.7	43.5	57.1	33.3
Percentage whose children (under age 16) work on the farm	0.0	4.3	0.0	0.0

Overall women at adopting farms are in a socially better situation than their counterparts at non-adopting farms. They enjoy more (perceived) job and tenure security and their health is better looked after. The 'tot system' and child labour is non-existent at both types of companies.

Table 15: Empowerment

	Adopters Baseline 2002	Non- adopters Baseline 2002	Adopters 2004	Non- adopters 2004
Percentage who are in possession of a written employment contract	88.9	56.5	100.0	50.0
Percentage who are indebted to the employer	14.8	17.3	28.6	16.7
Percentage who are members of an empowerment scheme	0.0	4.3	14.3	0.0
Percentage who are members of a trade union	3.7	4.3	0.0	33.3
Percentage who are aware of codes of practice	59.3	0.0	28.6	33.3

Regarding empowerment we are presented with a mixed picture. More women at adopting companies are in possession of a written employment contract and the beneficiaries of an empowerment scheme. However, more are indebted to the employer. Ironically, more women at non-adopting farms are aware of codes of practice.

4. Comparing permanent women workers at adopting companies with permanent men workers at non-adopting companies

Table 16: General profile

	Women at Adopters Baseline 2002	Men at Non- Adopters Baseline 2002	Women at Adopters 2004	Men at Non- Adopters 2004
Percentage of total workforce	45.7	77.2	33.3	85.0
Percentage Afrikaans speakers	100.0	91.0	100.0	94.1
Percentage of workers whose partner is also employed on the farm	59.3	57.7	57.1	58.8

Percentage of workers who have completed five years of schooling (i.e. are literate)	77.8	57.7	57.1	58.8
Percentage General workers	63.0	65.4	84.6	64.7
No. of people in household	3.78	3.76	4.14	4.41
No. of income earners in household	2.11	2.17	2.00	2.38

Table 17: Housing

	Women at Adopters Baseline 2002	Men at Non-Adopters Baseline 2002	Women at Adopters 2004	Men at Non-Adopters 2004
Percentage who live off-farm	11.1	9.0	14.3	8.8
Percentage who live in formal (i.e. brick) housing	93.3	96.2	100.0	91.4
Percentage whose houses have ceilings	70.4	80.8	74.1	79.4
Percentage who houses have electricity for lights, cooking, heating and warm water	51.9	25.6	57.1	23.5
Percentage who have to pay for all electricity	7.7	37.2	42.9	32.4
Percentage who have piped water into their plot or home	92.6	85.9	71.4	76.5
Percentage whose houses have a wash basin and bath or shower	48.1	24.4	57.1	29.4
Percentage whose houses have a flush toilet	77.8	70.5	85.7	70.6

Table 18: Material wealth

	Women at Adopters Baseline 2002	Men at Non-Adopters Baseline 2002	Women at Adopters 2004	Men at Non-Adopters 2004
Cash wage per week (before deductions) Rand	298.59	283.40	272.64	281.85
Percentage who possess their own home	3.7	7.7	14.3	6.8
Percentage who have a stove	70.4	50.0	71.4	73.5
Percentage who own a refrigerator	55.6	56.4	57.1	79.4
Percentage who own a television set	66.7	59.0	85.7	73.5
Percentage who own a car	14.8	5.1	14.3	11.8

Table 19: Social well-being

	Women at Adopters Baseline 2002	Men at Non-Adopters Baseline 2002	Women at Adopters 2004	Men at Non-Adopters 2004
Percentage who think they will be allowed to stay on in farm cottage indefinitely even if they lose their job	18.5	7.7	28.6	5.9
Percentage who are given wine as part of remuneration	18.5	6.4	0.0	2.9
Percentage who are provided with protective clothing when spraying pesticides	70.4	43.8	71.4	43.1
Percentage whose medical care is subsidized by employer	80.8	54.7	57.1	32.4
Percentage who are exposed to HIV/AIDS education through employer	59.3	26.9	100.0	44.1
Percentage who have access to a crèche	96.3	57.7	100.0	47.1
Percentage whose children's education is subsidized by the employer	33.3	13.0	14.3	8.8
Percentage who never suffer verbal abuse by the employer	88.9	54.5	57.1	58.8
Percentage who never suffer physical abuse by the employer	88.9	85.7	100.0	91.2
Percentage who think their employer will not retrench them even if their partner loses his	40.7	46.2	57.1	52.9
Percentage whose children (under age 16) work on the farm	0.0	0.0	0.0	0.0

Table 20: Empowerment

	Women at Adopters Baseline 2002	Men at Non-adopters Baseline 2002	Women at Adopters 2004	Men at Non-adopters 2004
Percentage who are in possession of a written employment contract	88.9	47.4	100.0	79.4
Percentage who are indebted to the employer	14.8	15.3	28.6	26.5
Percentage who are members of an empowerment scheme	0.0	2.6	14.3	0.0
Percentage who are members of a trade union	3.7	12.8	0.0	20.6
Percentage who are aware of codes of	59.3	17.9	28.6	32.4

practice				
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5. Comparing women and men permanent workers at non-adopting companies

Table 21: General profile

	Women Baseline 2002	Men Baseline 2002	Women 2004	Men 2004
Percentage of total workforce	22.7	77.2	15.0	85.0
Percentage Afrikaans speakers	91.3	91.0	83.3	94.1
Percentage whose partner is also employed on the farm	65.2	57.7	83.3	58.8
Percentage who have completed five years of schooling (i.e. are literate)	43.5	57.7	50.0	58.8
Percentage general workers	91.3	65.4	100.0	64.7
No. of people in household	4.09	3.76	3.67	4.41
No. of income earners in household	2.43	2.17	2.17	2.38

Table 22: Housing

	Women Baseline 2002	Men Baseline 2002	Women 2004	Men 2004
Percentage who live off-farm	0.0	9.0	16.7	8.8
Percentage who live in formal (i.e. brick) housing	100.0	96.2	100.0	91.4
Percentage whose houses have ceilings	91.3	80.8	66.7	79.4
Percentage whose houses have electricity for lights, cooking, heating and warm water	26.1	25.6	33.3	23.5
Percentage who have to pay for all electricity	65.2	37.2	66.7	32.4
Percentage who have piped water into their plot or home	95.7	85.9	83.3	76.5
Percentage whose houses have a wash basin and bath or shower	52.2	24.4	33.3	29.4
Percentage whose houses have a flush toilet	82.6	70.5	100.0	70.6

Table 23: Material wealth

	Women Baseline 2002	Men Baseline 2002	Women 2004	Men 2004
Cash wage per week (before deductions) Rand	174.57	283.40	192.50	281.85
Percentage who possess their own home	0.0	7.7	0.0	6.8
Percentage who have a stove	56.5	50.0	16.7	73.5
Percentage who own a refrigerator	60.9	56.4	66.7	79.4
Percentage who own a television set	69.6	59.0	50.0	73.5
Percentage who own a car	4.3	5.1	0.0	11.8

Table 24: Social well-being

	Women Baseline 2002	Men Baseline 2002	Women 2004	Men 2004
Percentage who think they will be allowed to stay on in farm cottage indefinitely even if they lose their job	16.1	7.7	0.0	5.9
Percentage who are given wine as part of remuneration	13.0	6.4	0.0	2.9
Percentage who are provided with protective clothing when spraying pesticides	45.5	43.8	66.7	43.1
Percentage whose medical care is subsidized by employer	56.5	54.7	50.0	32.4
Percentage who are exposed to HIV/AIDS education through employer	21.7	26.9	33.3	44.1
Percentage who have access to a crèche	69.6	57.7	66.7	47.1
Percentage whose children's education is subsidized by the employer	9.1	13.0	16.7	8.8
Percentage who never suffer verbal abuse by the employer	65.2	54.5	88.3	58.8
Percentage who never suffer physical abuse by the employer	93.1	85.7	100.0	91.2
Percentage who think their employer will not retrench them even if their partner loses hers/his	43.5	46.2	33.3	52.9
Percentage whose children (under age 16) work on the farm	4.3	0.0	0.0	0.0

Table 25: Empowerment

	Women Baseline 2002	Men Baseline 2002	Women 2004	Men 2004
Percentage who are in possession of a written employment contract	56.5	47.4	50.0	79.4
Percentage who are indebted to the employer	17.3	15.3	16.7	26.5
Percentage who are members of an empowerment scheme	4.3	2.6	0.0	0.0
Percentage who are members of a trade union	4.3	12.8	33.3	20.6
Percentage who are aware of codes of practice	0.0	17.9	33.3	32.4

6. Comparing casual workers at adopting companies with permanent workers at non-adopters

Table 26: General profile

	Casuals at Adopters Baseline 2003	Permanents at Non-Adopters Baseline 2002	Casuals at Adopters 2004	Permanents at Non-Adopters 2004
Women as % of total workforce	61.9	22.8	54.5	15.0
Percentage Afrikaans speakers	81.0	91.1	63.6	92.5
Percentage who have completed five years of schooling (i.e. are literate)	95.0	54.5	86.4	57.5
Percentage of General workers	95.2	71.3	95.5	70.0
No. of people in household	4.48	3.83	4.73	4.30
No. of income earners in household	3.05	2.23	2.59	2.35

Table 27: Housing

	Casuals at Adopters Baseline 2003	Permanents at Non-Adopters Baseline 2002	Casuals at Adopters 2004	Permanents at Non-Adopters 2004
Percentage who live off-farm	100.0	6.9	63.6	10.0
Percentage who live in formal (i.e. brick) housing	95.0	97.0	86.4	95.0
Percentage who houses have ceilings	42.9	83.2	72.7	77.5
Percentage who houses have electricity for lights, cooking, heating and warm water	19.0	25.7	18.2	25.0
Percentage who have to pay for all electricity	75.0	43.6	71.4	37.5
Percentage who have piped water into their plot or home	85.7	88.1	77.3	77.5
Percentage whose houses have a wash basin and bath or shower	28.6	30.7	18.2	30.0
Percentage whose houses have a flush toilet	90.5	73.3	81.8	75.0

Table 28: Material wealth

	Casuals at Adopters Baseline 2003	Permanents at Non-Adopters Baseline 2002	Casuals at Adopters 2004	Permanents at Non-Adopters 2004
Cash wage per week (before deductions) Rand	179.09	257.33	291.13	268.45
Percentage who possess their own home	19.0	6.0	31.8	7.5
Percentage who have a stove	66.7	40.6	66.7	37.6
Percentage who own a refrigerator	52.4	57.4	57.1	77.5
Percentage who own a television set	47.6	61.4	81.0	70.0
Percentage who own a car	4.8	5.0	0.0	10.0

Table 29: Social well-being

	Casuals at Adopters Baseline 2003	Permanents at Non-Adopters Baseline 2002	Casuals at Adopters 2004	Permanents at Non-Adopters 2004
Percentage who are given wine as part of remuneration	0.0	7.9	0.0	2.5
Percentage who are exposed to HIV/AIDS education through employer	33.3	25.7	54.5	42.5
Percentage who have access to a crèche	57.1	60.4	77.3	50.0
Percentage who never suffer verbal abuse by the employer	66.7	57.0	86.4	62.5
Percentage who never suffer physical abuse by the employer	100.0		100.0	
Percentage whose children (under age 16) work on the farm	4.8	1.0	0.0	0.0

Table 30: Empowerment

	Casuals at Adopters Baseline 2003	Permanents at Non-adopters Baseline 2002	Casuals at Adopters 2004	Permanents at Non-adopters 2004
Percentage who are in possession of a written employment contract	52.4	49.5	54.5	75.0
Percentage who are indebted to the employer	42.9	15.9	22.7	25.0
Percentage who are members of a trade union	0.0	10.9	4.5	22.5

Percentage who are aware of codes of practice	19.0	13.9	18.2	32.5
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7. Comparing casual workers at adopting and non-adopting companies

Table 31: General profile

	Casuals at Adopters Baseline 2003	Casuals at Non-Adopters Baseline 2003	Casuals at Adopters 2004	Casuals at Non-Adopters 2004
Women as % of total workforce	61.9	75.0	54.5	52.9
Percentage Afrikaans speakers	81.0	50.0	63.6	64.7
Percentage who have completed five years of schooling (i.e. are literate)	95.0	65.0	86.4	87.5
Percentage of General workers	95.2	100.0	95.5	100.0
No. of people in household	4.48	4.40	4.73	3.76
No. of income earners in household	3.52	2.45	2.59	2.35

Table 32: Housing

	Casuals at Adopters Baseline 2003	Casuals at Non-Adopters Baseline 2003	Casuals at Adopters 2004	Casuals at Non-Adopters 2004
Percentage who live off-farm	100.0	65.0	63.6	76.5
Percentage who live in formal (i.e. brick) housing	90.5	75.0	86.4	58.8
Percentage whose houses have ceilings	42.9	65.0	72.7	23.5
Percentage whose houses have electricity for lights, cooking, heating and warm water	19.0	20.0	18.2	11.8
Percentage who have to pay for all electricity	75.0	65.0	71.4	47.1
Percentage who have piped water into their plot or home	85.7	90.0	77.3	85.8
Percentage whose houses have a wash basin and bath or shower	26.6	20.0	18.2	23.6
Percentage whose houses have a flush toilet	90.5	80.0	81.8	76.5

Table 33: Material wealth

	Casuals at Adopters Baseline 2003	Casuals at Non-Adopters Baseline 2003	Casuals at Adopters 2004	Casuals at Non-Adopters 2004
Cash wage per week (before deductions) Rand	179.09	179.05	291.93	192.73
Percentage who possess their own home	19.0	40.0	31.8	36.3
Percentage who have a stove	66.7	30.0	66.7	56.3
Percentage who own a refrigerator	52.4	55.0	57.1	50.0
Percentage who own a television set	47.6	70.0	81.0	37.5
Percentage who own a car	4.8	0.0	0.0	6.3

Table 34: Social well-being

	Casuals at Adopters Baseline 2003	Casuals at Non-Adopters Baseline 2003	Casuals at Adopters 2004	Casuals at Non-Adopters 2004
Percentage who are given wine as part of remuneration	0.0	0.0	0.0	0.0
Percentage who are exposed to HIV/AIDS education through employer	33.0	5.0	54.5	17.6
Percentage who have access to a crèche	57.1	25.0	77.3	64.7
Percentage who never suffer verbal abuse by the employer	66.7	95.0	86.4	58.8
Percentage who never suffer physical abuse by the employer	100.0	95.0	100.0	100.0
Percentage whose children (under age 16) work on the farm	4.8	0.0	0.0	0.0

Table 35: Empowerment

	Casuals at Adopters Baseline 2003	Casuals at Non-adopters Baseline 2003	Casuals at Adopters 2004	Casuals at Non-adopters 2004
Percentage who are in possession of a written employment contract	52.4	30.0	54.5	47.1
Percentage who are indebted to the employer	42.9	15.0	22.7	23.5
Percentage who are members of a trade union	0.0	10.0	4.5	5.9
Percentage who are aware of	19.0	0.0	18.2	11.8

codes of practice				
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8. Comparing women casual workers and men casual workers at non-adopting companies

Table 36: General profile

	Women Baseline 2003	Men Baseline 2003	Women 2004	Men 2004
Percentage of total workforce	75.0	25.0	52.94	47.06
Percentage Afrikaans speakers	53.3	40.0	55.6	75.0
Percentage who have completed five years of schooling (i.e. are literate)	66.7	60.0	88.9	85.7
Percentage general workers	100.0	100.0	100.0	100.0
No. of people in household	5.20	52.0	5.89	4.13
No. of income earners in household	2.40	2.60	2.00	2.75

Table 37: Housing

	Women Baseline 2003	Men Baseline 2003	Women 2004	Men 2004
Percentage who live off-farm	60.0	80.0	55.6	100.0
Percentage who live in formal (i.e. brick) housing	80.0	60.0	55.6	62.5
Percentage whose houses have ceilings	66.7	60.0	33.3	12.5
Percentage whose houses have electricity for lights, cooking, heating and warm water	20.0	20.0	22.2	0.0
Percentage who have to pay for all electricity	60.0	80.0	33.3	62.5
Percentage who have piped water into their plot or home	100.0	60.0	55.6	62.5
Percentage whose houses have a wash basin and bath or shower	20.0	20.0	44.4	0.0
Percentage whose houses have a flush toilet	80.0	80.0	77.8	75.0

Table 38: Material wealth

	Women Baseline 2003	Men Baseline 2003	Women 2004	Men 2004
Cash wage per week (before deductions) Rand	175.73	189.00	203.62	183.05
Percentage who possess their own home	33.4	60.0	44.4	25.0
Percentage who have a stove	33.3	20.0	50.0	62.5
Percentage who own a refrigerator	60.0	40.0	50.0	50.0
Percentage who own a television set	80.0	40.0	37.5	37.5

Percentage who own a car	0.0	0.0	0.0	12.5
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Table 39: Social well-being

	Women Baseline 2003	Men Baseline 2003	Women 2004	Men 2004
Percentage who are given wine as part of remuneration	0.0	0.0	0.0	0.0
Percentage who are exposed to HIV/AIDS education through employer	6.7	0.0	22.2	12.5
Percentage who have access to a crèche	26.7	20.0	66.7	62.5
Percentage who never suffer verbal abuse by the employer	93.3	100.0	55.6	62.5
Percentage who never suffer physical abuse by the employer	93.3	100.0	100.0	100.0
Percentage whose children (under age 16) work on the farm	0.0	0.0	0.0	0.0

Table 40: Empowerment

	Women Baseline 2002	Men Baseline 2002	Women 2004	Men 2004
Percentage who are in possession of a written employment contract	26.7	40.0	44.4	50.0
Percentage who are indebted to the employer	20.0	0.0	0.0	50.0
Percentage who are members of a trade union	6.7	20.0	11.1	0.0
Percentage who are aware of codes of practice	0.0	0.0	11.1	12.5

9. Comparing casual women workers at adopting companies with casual men workers at non-adopting companies

Table 41: General profile

	Casual Women at Adopters Baseline 2003	Casual Men at Non- adopters Baseline 2003	Casual Women at Adopters 2004	Casual Men at Non- adopters 2004
Percentage of total workforce	61.9	25.0	54.5	47.06
Percentage Afrikaans speakers	76.9	40.0	66.7	75.0
Percentage who have completed five years of schooling (i.e. are literate)	100.0	60.0	83.3	85.7
Percentage general workers	92.3	100.0	100.0	100.0
No. of people in household	4.69	52.0	4.17	4.13

No. of income earners in household	3.00	2.60	2.67	2.75
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Table 42: Housing

	Casual Women at Adopters Baseline 2003	Casual Men at Non-adopters Baseline 2003	Casual Women at Adopters 2004	Casual Men at Non-adopters 2004
Percentage who live off-farm	100.0	80.0	33.3	100.0
Percentage who live in formal (i.e. brick) housing	92.3	60.0	100.0	62.5
Percentage whose houses have ceilings	38.5	60.0	75.0	12.5
Percentage whose houses have electricity for lights, cooking, heating and warm water	7.7	20.0	8.3	0.0
Percentage who have to pay for all electricity	61.5	80.0	58.3	62.5
Percentage who have piped water into their plot or home	84.6	60.0	83.3	62.5
Percentage whose houses have a wash basin and bath or shower	38.5	20.0	16.7	0.0
Percentage whose houses have a flush toilet	92.3	80.0	91.7	75.0

Table 43: Material wealth

	Casual Women at Adopters Baseline 2003	Casual Men at Non-adopters Baseline 2003	Casual Women at Adopters 2004	Casual Men at Non-adopters 2004
Cash wage per week (before deductions) Rand	186.69	189.00	344.66	183.05
Percentage who possess their own home	23.1	60.0	25.0	25.0
Percentage who have a stove	61.5	20.0	54.5	62.5
Percentage who own a refrigerator	53.8	40.0	63.6	50.0
Percentage who own a television set	53.8	40.0	90.9	37.5
Percentage of who own a car	7.7	0.0	0.0	12.5

Table 44: Social well-being

	Casual Women at Adopters Baseline 2003	Casual Men at Non-adopters Baseline 2003	Casual Women at Adopters 2004	Casual Men at Non-adopters 2004
Percentage who are given wine as part of remuneration	0.0	0.0	0.0	0.0

Percentage who are exposed to HIV/AIDS education through employer	53.8	0.0	58.3	12.5
Percentage who have access to a crèche	69.2	20.0	75.0	62.5
Percentage who never suffer verbal abuse by the employer	76.9	100.0	83.3	62.5
Percentage who never suffer physical abuse by the employer	100.0	100.0	100.0	100.0
Percentage whose children (under age 16) work on the farm	7.7	0.0	0.0	0.0

Table 45: Empowerment

	Casual Women at Adopters Baseline 2002	Casual Men at Non-adopters Baseline 2002	Casual Women at Adopters 2004	Casual Men at Non-adopters 2004
Percentage who are in possession of a written employment contract	61.5	40.0	58.3	50.0
Percentage who are indebted to the employer	38.5	0.0	25.0	50.0
Percentage who are members of a trade union	0.0	20.0	0.0	0.0
Percentage who are aware of codes of practice	23.1	0.0	23.5	12.5

10. Comparing casual women workers at adopting companies with permanent men workers at non-adopting companies

Table 46: General profile

	Casual Women at Adopters Baseline 2003	Permanent Men at Non-adopters Baseline 2002	Casual Women at Adopters 2004	Permanent Men at Non-adopters 2004
Percentage of total workforce	61.9	77.2	54.5	85.0
Percentage Afrikaans speakers	76.9	91.0	66.7	94.1
Percentage who have completed five years of schooling (i.e. are literate)	100.0	57.7	83.3	58.8
Percentage general workers	92.3	65.4	100.0	64.7
No. of people in household	4.69	3.76	4.17	4.41
No. of income earners in household	3.00	2.17	2.67	2.38

Table 47: Housing

	Casual Women at Adopters Baseline 2003	Permanent Men at Non-adopters Baseline 2002	Casual Women at Adopters 2004	Permanent Men at Non-adopters 2004
Percentage who live off-farm	100.0	9.0	33.3	8.8
Percentage who live in formal (i.e. brick) housing	92.3	96.2	100.0	91.4
Percentage whose houses have ceilings	38.5	80.8	75.0	79.4
Percentage whose houses have electricity for lights, cooking, heating and warm water	7.7	25.6	8.3	23.5
Percentage who have to pay for all electricity	61.5	37.2	58.3	32.4
Percentage who have piped water into their plot or home	84.6	85.9	83.3	76.5
Percentage whose houses have a wash basin and bath or shower	38.5	24.4	16.7	29.4
Percentage whose houses have a flush toilet	92.3	70.5	91.7	70.6

Table 48: Material wealth

	Casual Women at Adopters Baseline 2003	Permanent Men at Non-adopters Baseline 2002	Casual Women at Adopters 2004	Permanent Men at Non-adopters 2004
Cash wage per week (before deductions) Rand	186.69	283.40	344.66	281.85
Percentage who possess their own home	23.1	7.7	25.0	6.8
Percentage who have a stove	61.5	50.0	54.5	73.5
Percentage who own a refrigerator	53.8	56.4	63.6	79.4
Percentage who own a television set	53.8	59.0	90.9	73.5
Percentage of who own a car	7.7	5.1	0.0	11.8

Table 49: Social well-being

	Casual Women at Adopters Baseline 2003	Permanent Men at Non-adopters Baseline 2002	Casual Women at Adopters 2004	Permanent Men at Non-adopters 2004
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Percentage who are given wine as part of remuneration	0.0	6.4	0.0	2.9
Percentage who are exposed to HIV/AIDS education through employer	53.8	26.9	58.3	44.1
Percentage who have access to a crèche	69.2	57.7	75.0	47.1
Percentage who never suffer verbal abuse by the employer	76.9	54.5	83.3	58.8
Percentage who never suffer physical abuse by the employer	100.0	85.7	100.0	91.2
Percentage whose children (under age 16) work on the farm	7.7	0.0	0.0	0.0

Table 50: Empowerment

	Casual Women at Adopters Baseline 2003	Permanent Men at Non-adopters Baseline 2002	Casual Women at Adopters 2004	Permanent Men at Non-adopters 2004
Percentage who are in possession of a written employment contract	61.5	47.4	58.3	79.4
Percentage who are indebted to the employer	38.5	15.3	25.0	26.5
Percentage who are members of a trade union	0.0	12.8	0.0	20.6
Percentage who are aware of codes of practice	23.1	17.9	23.5	32.4

11. Comparing casual women workers at adopting companies with casual women workers at non-adopting companies

Table 51: General profile

	Casual Women at Adopters Baseline 2003	Casual women at Non-adopters Baseline 2003	Casual Women at Adopters 2004	Casual women at Non-adopters 2004
Percentage of total workforce	61.9	75.0	54.5	52.9
Percentage Afrikaans speakers	76.9	53.3	66.7	55.6
Percentage who have completed five years of schooling (i.e. are literate)	100.0	66.7	83.3	88.9
Percentage general workers	92.3	100.0	100.0	100.0
No. of people in household	4.69	4.13	4.17	3.44
No. of income earners in household	3.00	2.40	2.67	2.00

Table 52: Housing

	Casual Women at Adopters Baseline 2003	Casual women at Non-adopters Baseline 2003	Casual Women at Adopters 2004	Casual women at Non-adopters 2004
Percentage who live off-farm	100.0	60.0	33.3	55.6
Percentage who live in formal (i.e. brick) housing	92.3	80.0	100.0	55.6
Percentage whose houses have ceilings	38.5	66.7	75.0	33.3
Percentage whose houses have electricity for lights, cooking, heating and warm water	7.7	20.0	8.3	22.2
Percentage who have to pay for all electricity	61.5	60.0	58.3	33.3
Percentage who have piped water into their plot or home	84.6	100.0	83.3	55.6
Percentage whose houses have a wash basin and bath or shower	38.5	20.0	16.7	44.4
Percentage whose houses have a flush toilet	92.3	80.0	91.7	77.8

Table 53: Material wealth

	Casual Women at Adopters Baseline 2003	Casual Women at Non-adopters Baseline 2003	Casual Women at Adopters 2004	Casual Women at Non-adopters 2004
Cash wage per week (before deductions) Rand	186.69	175.73	344.66	183.05
Percentage who possess their own home	23.1	33.4	25.0	44.4
Percentage who have a stove	61.5	33.3	54.5	50.0
Percentage who own a refrigerator	53.8	60.0	63.6	50.0
Percentage who own a television set	53.8	80.0	90.9	37.5
Percentage of who own a car	7.7	0.0	0.0	0.0

Table 54: Social well-being

	Casual Women at Adopters Baseline 2003	Casual Women at Non-adopters Baseline 2003	Casual Women at Adopters 2004	Casual Women at Non-adopters 2004
Percentage who are given wine as part of remuneration	0.0	0.0	0.0	0.0
Percentage who are exposed to HIV/AIDS education through employer	53.8	6.7	58.3	22.2
Percentage who have access to a	69.2	26.7	75.0	66.7

crèche				
Percentage who never suffer verbal abuse by the employer	76.9	93.3	83.3	55.6
Percentage who never suffer physical abuse by the employer	100.0	93.3	100.0	100.0
Percentage whose children (under age 16) work on the farm	7.7	0.0	0.0	0.0

Table 55: Empowerment

	Casual Women at Adopters Baseline 2003	Casual Women at Non-adopters Baseline 2003	Casual Women at Adopters 2004	Casual Women at Non-adopters 2004
Percentage who are in possession of a written employment contract	61.5	26.7	58.3	44.4
Percentage who are indebted to the employer	38.5	20.0	25.0	0.0
Percentage who are members of a trade union	0.0	6.7	0.0	11.1
Percentage who are aware of codes of practice	23.1	0.0	23.5	11.1