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Gender, Poverty and Inequality: Exploration from a Transformative Perspective

By Catherine Ndinda¹ & Tidings P. Ndhlovu²

Introduction

International Women’s Month (March) is a reminder of how women have been engaged in the struggles for emancipation throughout the world. In South Africa, the month of August was also set aside as Women’s Month to mark that fateful day on 9 August when over 20,000 women marched to the Union Building in Pretoria to protest against the 1950 Pass Laws. They sang and chanted the now-familiar slogan *Wathint’ Abafazi wa thint’ imbokodo* (literally translated from isiZulu to mean: “if you strike women, you strike a rock or grindstone). In 1966, the anti-apartheid South African liberation icon, the late Winnie Nomzamo Madikizela-Mandela, also declared: “To those who oppose us, we say, ‘Strike the woman, and you strike the rock’”.

Despite these worldwide struggles, relatively little progress has occurred with regard to gender equality and women’s empowerment. Given the apparent self-evident nature of inequalities and how such concepts are routinely used in everyday language - indeed, in so far as gender is reflective of social structures and power relations that produce and sustain inequalities - it is ironic that relatively few studies outside international development have probed deeper into the processes that underlie persistent poverty from a gender, class, race and ethnic perspective. In other words, analysis should be focused not only on the provision of “basic needs”, but also how men and women experience different and unequal “states of poverty”. It should be concentrated on class-based notions of poverty, the processes of coping (livelihood strategies), and multi-dimensional

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Clearly, there is a need to interrogate the links between gender, poverty and inequality as enunciated in the Sustainable Development Goals (SDGs). To what extent are transformative approaches associated with social protection/inclusion (SDG 1), empowerment of all women and girls (SDG 5) and human rights, the ending of poverty in all forms everywhere and reduction of inequality within and between countries (SDG 10)? Adopting more holistic transformative approaches arguably ensures that we take account of areas of differences and commonalities (Chancer and Watkins, 2006). Deconstruction will reveal concealed differences among men and women in terms of race, class, ethnicity and country of origin (for refugees). In other words, we must focus not only on what divides and unites us, but also the complex and interdependent processes that highlight the reasons why women are subordinated. Thus, given diversity of populations, levels of oppression depend on gender, class, race and ethnicity. Such conceptualisations also guards against tunnel vision approaches for investigating SDGs and their implications for redistributive policies and the nature of ownership and control (Duhlerup, 2017; Kabeer, 2015b: 389; Ndinda and Ndlovu, 2016; Saunders, 2018).

According to Marlow and Martinez Dy (2018), we must “rethink the gender agenda”: we must recognise the complexity and/or “multiplicity” of the notion of gender, that is, take account of the “confluence of social forces” (Marlow and Martinez Dy, 2018: 13) that inform “positionality” (intersectionality) and, thus, provide “a more sophisticated engagement with gender” (ibid: 6). In addition, Hirsch (2018) argues that the death of Madikizela-Mandela is an opportunity for us to challenge the dominant and widely-accepted colonial narratives about gender. She adds that we must highlight the role of particularly black women in bringing about social change.

Throughout history, many women have been forgotten and, indeed, very few of them have been credited for their roles in revolutionary struggles (Hirsch, 2018; Ndinda & Adar, 2005). For example, Hirsch notes that: “Denmark this week [31 March 2018] unveiled its first statue of a black woman [Mary Thomas, the “Queen of the Fireburn”, who, in 1878, led riots and burning of plantations in the Danish colony of St Croix, now part of the US Virgin Islands, when promised changes to the terrible conditions experienced by Africans after the ending of slavery did not take place]. Citing Winnie Madikizela-Mandela, Ndinda and Adar (2005) argue that the significant role played by women during the liberation of South Africa, as well the sacrifices they made, have largely remained unappreciated. The media, in particular, has often focused on negative stereotypes. Madikizela-Mandela herself lamented the tendency to downplay women’s contribution to revolutionary transformation.

Following her death, obituaries by the local media (that had, ironically, vilified her during her life and accused her of being responsible for the death of Stampie Seipei, despite having been absolved of the murder of the teenager) projected Madikizela-Mandela as the mother of the nation, while the majority of the Western media continued to paint her as aggressive, hostile, angry and a terrorist. Not only is this reflective of racist and sexist ideology with regard to African women revolutionaries and liberators, but it is also consistent with the narrative of the supposed inferiority of black people, of male dominance and female docility and subservience. Madikizela-Mandela’s contribution to the struggle against gender, racial and cultural oppression, together with that of many countless women, is illustrative of the need to use intersectionality in critically assessing the contributions of women to social change all over the world.
Kekana-Phaswana (2018) contends that not only are radical (feminist) women like Madikizela-Mandela often denigrated and maligned (“distorted construction of black women as similar and homogenous”), but the complexities of their lives during rebellions against injustice, (racial) discrimination, poverty and inequality are also used to dismiss their important roles in liberation struggles. As Hirsch (2018: 2) puts it, such narratives also conceal “a reluctance to admit” to (past) injustices, prejudices and the continued dominance of “white supremacist oppression”.

It is against this background that we will first situate the concepts of poverty and inequality before examining some of the methodological approaches and their limitations. It is in this light that we draw some tentative conclusions that enable us to introduce the contributions to this Special Issue. These contributions take stock of the progress that has been made in terms of gender, poverty and inequality, provide a portrayal of women that interrogates class, ethnicity, race and other categories besides, and envision the future.

Situational Overview

Undoubtedly, in many countries government legislation on race and gender, and (in the case of South Africa) Broad-Based Black Economic Empowerment (B-BEE), have helped to re-shape the landscape to ensure significant progress regarding access to education for girls and political representation (Hausmann et al, 2017; Ndlovu and Spring, 2009). The interventions that are designed to achieve gender equality and empowerment are critical in improving the status of women and tackling the challenges that keep women oppressed and subjugated.

However, what has become increasingly clear is that legal frameworks, policies and programmes intended to ensure gender equality and tackle the feminisation of poverty have had limited success. Although great strides have been made on the political front, not as much progress has taken place in the economic empowerment of women particularly in the higher echelons of the economy, as well as in health and survival and levels of life expectancy (Hausmann et al, 2017; Ndlovu and Spring, 2009: 45). The slow progress is even more concerning world-wide if one considers that South Africa is actually ahead of Australia, Canada, the USA and the United Kingdom in the proportion of female company directors (ibid). This means that it may be difficult to meet the SDGs on gender equality and promotion of women’s empowerment by the target date of 2030, let alone mainstream gender equality into other spheres of the economy (Alkire et al, 2013: 71; CEE, 2013: vii; 2017).

The UNDP Report alludes to “deepening inequalities” (UNDP, 2016: iii). The Report also identifies “the mutually reinforcing gender barriers that deny many women the opportunities and employment necessary to realize the full potential of their lives” (UNDP, 2016: iii). Indeed, aggregate data indicates that women constitute a majority among the most deprived. Based on current trends, the World Economic Forum’s Global Gender Gap (GGG) Report 2017 predicts that “the overall global gender gap can be closed in exactly 100 years across the 106 countries covered since the inception of the Report, compared to 83 years last year [2016]” (Hausmann et al, 2017: viii).

While a (re) evaluation of ownership transfers, systems of quotas or affirmative action, and preferential procurement and enterprise development, may address questions of control and employment equity, as well as spread benefits widely to women and the disabled, there has generally not been sufficient social investment to up-lift particularly poor women in rural areas and the disabled, and empower them to lift themselves out of poverty (Ndlovu and Ndinda, 2017;...
Ndinda et al., 2017). This is despite legislation in countries like South Africa to speed up gender and racial transformation, with penalties for miscreants; for example, fines imposed on companies that do not comply with set targets. It is also noteworthy that while scorecards in South Africa have gone some way in evaluating the extent to which mainstreaming of gender equality has advanced, this has also been accompanied by widespread fraudulent ‘fronting’ practices and (price) collusion by some companies in especially the building and construction industry (Bowen et al., 2015; CEE, 2017; Frontier Advisory, 2013; dti, 2017; Ndhlovu and Spring, 2009; Ndinda and Uzodike 2012).

Notwithstanding this, the ‘increased attention’ on women’s rights issues has also stimulated critical analysis by, amongst others, investigators who couch their arguments in terms of feminist transformation and women’s economic citizenship. These range from narrower and institutional mandates of promoting and coordinating women’s rights and opportunities to the more radical examination of gender equality that is predicated upon women’s power and agency. For its part, South Africa’s Commission on Gender Equality (CGE) describes its vision of “a society free from gender oppression and inequality”, bemoaning the slow pace of transformation (CGE, 2018; also see Makiwane et al., 2017). However, while gender equality “is intuitively easy to understand”, it must be emphasised that “empowerment” conjures up different images for different audiences in different circumstances; and, indeed, gender equality does not necessarily equate to (measuring) empowerment, let alone ensure equality of outcome (Alkire et al., 2013: 71).

It is with this view in mind that the South Africa Human Rights Commission (SAHRC) makes a distinction between ‘formal equality’ (equal treatment of everyone) and ‘substantive equality’ (emphasis on ‘equality of results and opportunity’). While progress has been made on the political front, gender inequality and poverty still persist. Clearly, “Structural or systemic inequalities – in other words, unequal structures, hierarchies and power relationships that underlie our society and that prejudice women and persons based on SOGIE [sexual orientation, gender identity and expression] [or disability or race] – are left unaddressed” (SAHRC: 2017a: 8; 2017b: 9; 2017c: 9). It cannot be overemphasised that intersectionality is crucial to our understanding of the matrix of gender, race, class and ethnicity that is at the root of poverty and inequality (Ndinda and Ndhlovu, 2016; Ndinda and Uzodike 2012).

**Methodological Approaches and Related Issues**

To understand gender inequality and poverty and their implications for praxis, it is important to employ methodologies that not only disaggregate data, but are also linked to theoretical approaches that deconstruct the place of women in contemporary society. To this end, various measures have been developed globally to monitor change with regard to these indicators.

For instance, the Businesswomen’s Association of South Africa (BWASA) Annual Censuses seek to provide exhaustive quantitative analyses of women in boardrooms and senior management, as well as promote awareness of corporate issues regarding transformation. This is partly because information on director and directorships is easily accessible from JSE-listed companies and state-owned enterprises (SOE). In addition, surveys of employment trends concerning particularly top management and skilled people are conducted by, for example, the Commission for Employment Equity (CEE) on behalf of the Department of Labour in South Africa. The reports trace the trends at the workplace according to race, gender and disabilities (CEE, 2013: 1; 2017; Ndhlovu and Spring, 2009; StatsSA, 2014).
For international comparisons, the general tendency has been to use the Global Gender Gap Index (GGGI) that was first introduced by the World Economic Forum in 2006. The index combines quantitative data sets and some qualitative measures, but it does not directly measure empowerment (Hausmann et al., 2017; also see Alkire et al., 2013: 72). Based on “cross-country and time-series analysis” (Hausmann et al., 2017: 3), the GGGI “seeks to measure one important aspect of gender equality: the relative gaps between women and men across four key areas: health, education, economy and politics” (Klaus Schwab’s Preface to the 2017 Report, Hausmann et al., 2017: v; also see Hallward-Driemeier, 2013: 259-260).

The United Nations Development Programme (UNDP), through the Human Development Index (HDI) also monitors various aspects of human development and makes comparisons across countries. While the HDI is important, gender-related measures such as the Gender development index (GDI) and gender inequality index (GII) monitor human development trends from a gender perspective (UN, 2017; UNDP, 2016). They acknowledge that poverty is a complex phenomenon and income alone cannot account for extreme forms of poverty observed across the globe particularly in developing countries, hence the development of the multi-dimensional poverty index (MDI) (also see Saunders, 2018: 17).

For its part, the Southern Africa Gender Protocol Barometer promotes the SADC Gender and Development Index (SGDI) that purports to be more objective in its weighting of the performance of countries. Its six objectives include: (i) women’s empowerment; (ii) elimination of discrimination and attainment of gender equality and equity through legislation, policy initiatives, multi-dimensional programmes or projects for women’s empowerment; (iii) harmonisation of policy instruments in line with, for example, the African Union’s Agenda 2063 and, (iv) reserving strategies for any contingencies regarding women’s rights, human rights, and the extent of democratic dispensation (SADC, 2016; also see StatsSA, 2014). Further, the SGDI is complemented by a Citizen Score Card (CSC) that seeks to gauge perceptions of women and men in the SADC region (ibid.).

In their innovative “counting” approach, Alkire et al. (2013; 2017a; 2017c), Alkire and Foster (2011) and Foster (2009) not only seek to sensitively measure the extent to which people are deprived, but also how long they have experienced multi-dimensional poverty. In so doing, they develop “indices of chronic and transient poverty” (Alkire et al., 2017a). In their earlier work that was specifically focused on the agricultural sector, Alkire et al. (2013) argued that political action and empowerment could only be understood within specific circumstances. Therefore, they developed the Women’s Empowerment in Agriculture Index (WEAI) with this view in mind. This is also how they defined their index that measures 5 domains of empowerment (5DE), and employed the gender parity index (GPI). The 5DE are concerned with: (i) production decisions; (ii) greater participation of women in power decisions pertaining to productive resources; (iii) how far control can be exercised with regard to the use of income: (iv) community leadership and; (v) the allocation of time (ibid: 73; also see StatsSA, 2014). Given an overall score of 5, the higher the score, the more the level of empowerment. Moreover, the GPI also reflects the extent to which the gender gap has been reduced (Alkire et al., 2013: 73-77).

Limitations

A number of problems are immediately apparent with these indices. There are inevitable data problems. For example, in the case of the BWASA Censuses, there are some difficulties associated with accessing information on executive managers of companies that respond to Census
requests for verification and information (Frontier Advisory, 2013). Moreover, the self-reporting process of both the BWASA and CEE do leave some room for circumvention of rules by employers. It is for this reason that the CEE was involved in the amendment of the Employment Equity Act designed to tighten compliance (with accompanying fines for non-compliance) and ensure that designated employers submit yearly reports, although there are still problems of accountability, and appropriate and proportionate sanctions for not meeting targets (CEE, 2013: 1; 2017; Frontier Advisory, 2013).

Allied with data problems are problems of comprehensiveness. For example, the BWASA annual censuses concentrate on the corporate landscape (Frontier Advisory, 2013; Ndhlovu and Spring, 2009), while the SDGI also has gaps in some categories. While Statistics South Africa (2017) has made some progress in analysing how much time is spent by men and women in the formal workplace and on unpaid work in the home, there is still no comprehensive picture of the informal sector, indeed what constitutes reproductive work or time-use.

While Alkire et al (2013) went some way in addressing aggregation problems that continue to dog other indices such as the UN (2017) and UNDP’s (2016) GIII, the World Economic Forum’s GGII and SADC’s SGDI/CSC - and also attempted to measure both gender equality and women’s empowerment - they acknowledge that their concentration on agriculture (the WEAI) gave the impression that women who are outside this sector were necessarily disempowered (Alkire et al, 2013: 72-75; 82; 89; also see Hallward-Driemeier, 2013: 257). In addition, they note that concentrating on decision-making by female-only households tends to exclude other female members within the household (s) (ibid: 89). In their more recent work, they also highlight the challenge of combining indices of “chronic and transient poverty” with approaches that identify and measure multi-dimensional poverty (Alkire et al, 2017a). Nevertheless, they conclude that a more holistic approach would result from the incorporation of other approaches that focus on poverty alleviation in “multidimensional and income poverty” (ibid). Perhaps one of the approaches that could be integrated into this all-encompassing approach might be the Multiples Correspondence Analysis that employs a weighting scheme for indicators (Pasha, 2017).

On a global scale, because data for the Global Gender Gap Index is often complex and there is no metadata to determine the underlying purpose for which it is collected, it is not always clear why some countries are left out altogether in some Global Gender Gap Reports while other countries are added to the list. In some cases, missing data and missing variables have been given as reasons for restricted coverage at various time-periods (Hausmann et al, 2017). It goes without saying that different methods of collating and analysing data by different organisations also result in different statistics for the same phenomenon.

There are also problems of comparing like with like. For example, the 2010 BWA Census specifically referred to “a substantial increase in absolute numbers and this, in part, . . . [was] due to companies including subsidiaries, where previously they might not have done so. It must be noted that due to inclusion of subsidiaries, some comparisons to historical data . . . [would] not be possible” (BWASA, 2010: 10-11). With regard to the UN (2017) and UNDP’s (2016) Gender Inequality Index (GIII), we must also caution against putting too much significance on values vis a vis rankings due to sampling variations from report to report. Similarly, the frequency at which data is computed casts doubt on how far different data sets can justifiably be compared.

Finally, there are conceptual problems relating to gender inequality (which may be context-specific) and, in particular, empowerment (whose interactive processes can only be fully ‘captured’ by qualitative rather than quantitative methods). Moreover: “Questions about control
over resources and income do not capture many of the nuances behind these domains [i.e. the 5 domains of empowerment]” (Alkire et al, 2013: 89; also see Alkire et al, 2013: 76; StatsSA, 2014). While some studies arguably paint a more complete picture of particularly the role of professional women in business, they should however be used with caution. On a different but related issue, Jerven (2013) also warns us not to take statistics, for example, in his case on GDP as a measure of economic development, at face value. According to Jerven (2013), if one takes the case of missing data, for example, even the World Bank does not know any more than anybody else; in fact, they often resort to guessing and extrapolation. He points to the problems of validity (for example, is GDP a correct measure?), reliability (is this measure consistent across time and space?) and comparability (if the measurement is not consistent over time and space, how can it enable us to compare like with like?). However, Jerven (2013) does not go much further than ensuring the accuracy and reliability of GDP figures (metadata, more resources for collecting and analysing data etc.). He does not sufficiently question the efficacy of the figures, nor does he delve deeper into alternative (social/welfare) indices that incorporate social, political and environmental factors into a composite index.

Is the glass ceiling cracking?

It is against this background that the Collection of papers in this Special Issue address some of these burning questions. While women comprise more than half the world’s working population, they are markedly under-represented in business decision-making. For sure, there has been progress in basic education and on political representation, but there are still challenges on the economic front. Although the studies in this Special Issue are a snapshot of primarily the state of play, they still provide us with insights into women’s economic empowerment. Men, particularly white men, continue to dominate the economic landscape.

The transformative approaches arguably re-visit gender inequality and poverty through a more radical prism. They seek to link theory with practice. Given intersectionality that brings together gender, class, racial and ethnic oppression, as well as delve into commonalities and differences, the contributions to this Special Issue place women at the epicentre of the struggles for emancipation and fundamental social change.

Rita Ozoemena addresses the legacy of apartheid in South Africa in which (black) women in particular were excluded from the decision-making process. Despite the constitutional precepts of “substantive equality” and affirmative action in the post-apartheid democratic era, poverty and inequality persist. Ozoemena locates the reasons for this in exclusionary factors of race, gender and culture/ethnicity. She proposes a transformative approach of “The Right to Development (RTD)” as a holistic way of prioritising people’s roles in eliminating poverty and inequality. It is against this background that Susan Hagood Lee focuses on particular aspects of the matrix of domination: race, gender, culture. Hagood Lee provides a discussion of women’s oppression in Cambodia not only in terms of their economic roles, but also from the perspective of ideological inequalities and/or religion in a patriarchal society. She proposes “modified cultural arrangements”, that is, “new ideological equalities” that will ensure that culture plays a positive role in engendering socialized equalities, re-balancing the stratified/hierarchical social structures of domination and subordination, and ensuring respect and self-esteem, inclusiveness and harmony in what she describes as “a new social construction of gender for the twenty-first century”.

This theme is at the centre of Newman Tekwa and Jimi Adesina’s “Transformative Social Policy Framework” for analysing gendered poverty and inequality in Zimbabwe specifically in
land reform. Using qualitative and quantitative methods, they conclude that land reforms did dismantle “racial inequalities in asset distribution . . . [and ameliorated] the problem of landlessness”. However, gender inequalities, particularly reproductive work and time-use, still remain. Further, Nicole Bohmer and Heike Schinneburg point to the paradox of Indian women making advances in higher education while their participation in the labour market declines, similarly to women’s educational advancement in Germany that is not equated with leadership roles. They identify “blind spots” that inhibit women in their careers. Following this, they put forward proposals to prevent or patch up the “leaky pipeline”: namely, changes in the educational curricula that will enable women to make decisions that are not reflective of dependency and poverty; transforming the knowledge base and; facilitating formal equality.

Chijioke Nwosu and Catherine Ndinda tackle the central theme about some progress having been made in addressing poverty in South Africa, but many people particularly women remaining poor. Using longitudinal rather than cross-sectional analysis that is often employed in many studies, they show that, over time, gender transitions (from male to female-headed households) is associated with increased poverty. They identify vulnerability of female-headed households for policy purposes, although the authors also add that they are still to conduct further research on factors that contribute to the transitioning to this vulnerable status. Ngo Quynh An and Yamada Kazuyo examine women’s employment opportunities in Vietnam. On the basis of a theoretical framework that puts a high score on care needs, the extent to which women’s work is valued and the available opportunities, their findings show that education and training have a positive relationship to women’s employment in Vietnam. Nonetheless, the authors argue that further research needs to be done to establish how far policies such as skills development have an impact on shifting power relations, the extent to which women shoulder the burden of poverty, and the consequent distributional issues.

Aswarthy and Kalpana also re-visit social relations, religion and enduring patriarchal structures. They examine a Muslim fishing village (Vettoor) in Kerala, India. Given the changing circumstances in the fisheries sector and the local state programmes to support livelihoods, women’s attempts to become entrepreneurs have concurrently emerged with the Indian government’s shift towards neo-liberalism. These contradictory pressures between the local state’s “socialist” ideology (and patriarchal and religious structures in Kerala) and the Indian government’s neo-liberal stance have led to tensions within the village. Men feel threatened by women’s increased participation in the fishing sector and this, in turn, forces women to either seek permission from their husbands to work or conceal their working status, while the neo-liberal Indian government continues to promote free markets and risk-taking.

A similar approach is suggested by Sithembile Sinyolo, Sikhulumile Sinyolo, Maxwell Mudhara and Catherine Ndinda in their analysis of two irrigation schemes in the Msinga Local Municipality of KwaZulu-Natal in South Africa. The study shows unequal access to irrigation water: men accessed more water than women; and also derived greater welfare benefits. Given that women can arguably achieve more welfare by accessing the same level of water as men, the authors propose policies to ensure equity in water access and resources that, in turn, can lead to alleviation of poverty and reduction of inequality. This should involve women taking up leadership roles in water management and resources, although this is likely to be resisted by men within such a patriarchal society.

Given these experiences, the following contributions address the extent to which women’s power and agency are exercised, as well as women’s livelihood strategies. Obianuju Okeke-Uzodike, Ufo Okeke-Uzodike and Catherine Ndinda examine the effectiveness of government
programmes and policies in empowering women in KwaZulu-Natal in South Africa. They show that, despite the enabling environment and public rhetoric, not enough emphasis has been placed on strengthening women’s entrepreneurial activities. Women still face problems of accessing resources, gender inequality and other barriers to their active participation in transformative development.

Further, Khayaat Fakier argues for the inclusion of women’s rights in decisions concerning energy use in South Africa. Using an eco-feminist approach, Fakier analyses the position of 20 women in Lwandle, a township in Cape Town, South Africa. Not only were women not consulted about the installation and environmental appropriateness of solar water heaters, but there was also little effort to solicit their views on wider concerns about job creation, privacy issues, time-use and access to resources. Fakier contends that eco-citizenship is necessary for ensuring women’s participation in planning and decisions regarding infrastructural development and environmental protection. For his part, Mark Nyandoro highlights women’s agency, community participation, indigenous concepts and entrepreneurship that can help to alleviate poverty in South Africa. He focuses on saving schemes such as Stokvel and mashonisa schemes to enable women to survive (livelihood strategies), attain independence and contribute to the eradication of poverty, notwithstanding some abuses in these rotating saving schemes.

Gwen Lesetedi emphasises the importance of gender in policy formulation and implementation in Botswana. However, she notes that inequality and poverty still persist despite the best efforts of government. Using data for 2009-2011, Lesetedi confirms that female headed households in Botswana bore the brunt of poverty and unemployment. They had relatively little resources to count on, and lag behind in education and skills training. Their vulnerability was accentuated by the unequal power relations with men within a patriarchal society. Lesetedi concludes that this situation reflects the feminisation of poverty, and suggests that policies should be focused more on gender and education and how government initiatives impact on women, particularly female headed households.

For their part, Monde Makiwane, Ntombizonke Gumede and Lien Molobela argue that socio-economic circumstances play an important role in the high rates of teen pregnancies in South Africa. Given that family planning services are readily available in South Africa, they conclude that cultural factors and the unhelpful attitudes of healthcare workers serve to explain why these services are not taken up (also see Ndinda et al., 2017). This contributes to a vicious cycle of dependency, poverty and inequality.
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