



# Mieux comprendre les inégalités pour des politiques publiques plus efficaces

Ressources et publications  
des Éditions Agence française de développement

# La recherche sur les inégalités

Recherche, évaluations, innovation... **Savoirs AFD** est la marque du groupe AFD dédiée à la valorisation des connaissances. Parcourez nos ressources et publications récentes éditées par **les Éditions Agence française de développement** pour mieux comprendre les inégalités afin que les politiques publiques puissent y répondre de façon efficace.

## Une approche multidimensionnelle des inégalités

Les travaux de recherche menés par l'AFD étudient les différentes dimensions du concept d'inégalités, ainsi que leurs nombreuses implications. Des inégalités de revenus et d'opportunités à la vulnérabilité et à la pauvreté en passant par la mobilité sociale, ces études permettent de comprendre les dynamiques sociétales, le rôle des politiques publiques et les interactions avec les autres défis mondiaux tels que le changement climatique.

## Des outils et des méthodes pour créer du dialogue

La recherche s'appuie sur des outils et des méthodes spécifiques pour mieux analyser les inégalités et pouvoir mieux y répondre en termes de recommandations de politiques publiques et de stratégies de développement.

## Une Facilité de recherche dédiée à l'étude des inégalités

L'AFD et l'Union européenne ont chacune fait de la lutte contre les inégalités une priorité. C'est dans ce contexte que ces deux institutions ont entamé leur collaboration en matière de réduction des inégalités avec la mise en place de la Facilité de recherche UE-AFD sur les inégalités en 2017.

- Pendant la première phase de cette facilité (2017-2020), 22 projets de recherche visant à mieux comprendre les inégalités socioéconomiques, leurs déterminants, leurs effets et leurs dynamiques ont été menés dans 32 pays.
- Suite au succès de cette première phase, l'extension de la Facilité a été lancée en 2021. Cette nouvelle phase contribue à l'élaboration de politiques publiques plus efficaces pour la réduction des inégalités dans quatre pays partenaires : Afrique du Sud, Colombie, Indonésie et Mexique. L'Extension a permis de publier une cinquantaine de papiers de recherche et policy briefs alimentant le dialogue politique sur les inégalités dans les pays partenaires.

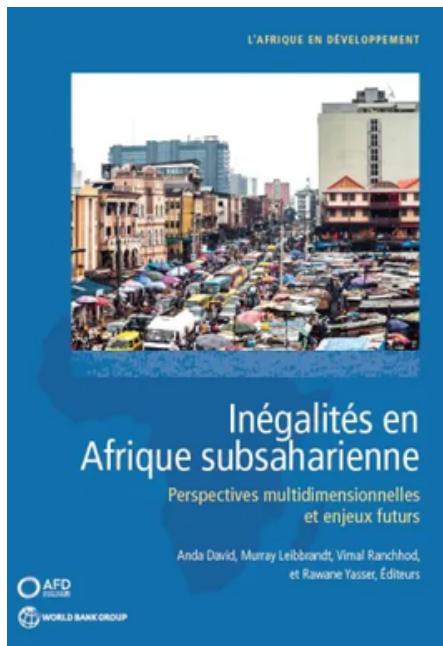
Pour en savoir plus :



# Nos publications récentes sur les inégalités

## Notre publication de référence *Inégalités en Afrique subsaharienne*

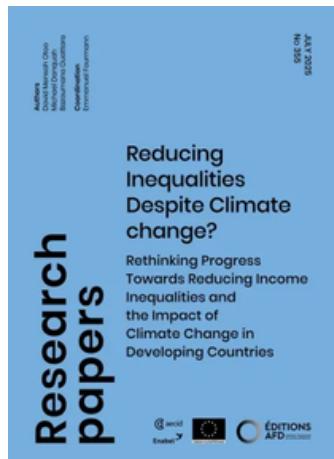
La montée des inégalités constitue un obstacle important au développement durable, et c'est dans ce contexte que cet ouvrage, *Inégalités en Afrique subsaharienne: Perspectives multidimensionnelles et défis futurs* (co-édité avec la Banque mondiale) apporte sa contribution aux débats en cours, en proposant une analyse approfondie des défis actuels et des perspectives d'avenir des inégalités sur le continent africain.



[Télécharger l'ouvrage](#)



# Nos publications récentes sur les inégalités



## Reducing Inequalities Despite Climate change? Rethinking Progress Towards Reducing Income Inequalities and the Impact of Climate Change in Developing Countries

This multicountry study incorporates the economic resources of countries and measures how countries are combining their resources to reduce income inequality. It also examines the effects of climate – temperature and rainfall – on effort by countries to reduce income inequality.

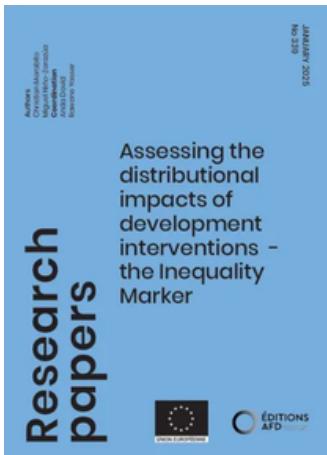


## Distributional Impact of Fiscal Policies: A Survey of Methodological Approaches

This research paper is meant to be a guide for analysts and policymakers on available tools for assessing the distributional impact of existing fiscal systems as well as policy reforms. In particular, we present detailed overviews of fiscal incidence analysis (FIA) and tax-benefit microsimulation models (MSM). The paper also briefly reviews alternative approaches to value benefits from education, health, and infrastructure, as well as different methods to analyze the distributional impact of fiscal policy by gender.



# Nos publications récentes sur les inégalités



## Assessing the distributional impacts of development interventions - the Inequality Marker

Persistent economic and social inequalities constrain the inclusive development of nations. The internationally agreed Sustainable Development Goal 10 (SDG10) and its targets, aim to address these constraints through the promotion of equalising policies. This paper tests the validity of the Inequality Marker and Distributional Impact Assessment (DIA) tools that have been developed to assess the contribution of development projects to inequality reduction using as case studies four AFD and European Commission funded projects in Benin, Djibouti-Ethiopia, Uganda, and Vietnam



# Nos publications récentes sur les inégalités en Afrique du Sud

The cover of the research paper is blue. On the left side, the word "Research papers" is written vertically. At the top right, there is some small text: "Auteurs : Gouvernement provincial d'Afrique du Sud, Comité de transition sociale, Afd Afrique du Sud, Afid Afrique du Sud". In the center, the title "Youth and the just transition" is followed by a subtitle "A profile of young NEET in Mpumalanga". At the bottom, there are two logos: the European Union flag and "ÉDITIONS AFD Afrique du Sud".

## Youth and the just transition. A profile of young NEET in Mpumalanga

With one of the highest youth unemployment rates in the world, South Africa's planning for a just transition needs to take into account the vulnerabilities of its youth cohorts, especially those that can be qualified as not in education, employment or training. This paper provides a profile of young people not in education, employment, or training (NEET) in Mpumalanga province, the region with the highest exposure to the coal exit.



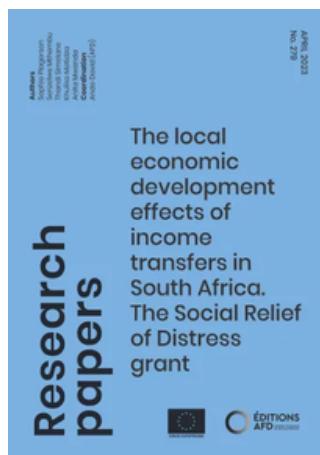
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## Public Employment Programmes in South Africa's Changing Social Protection Landscape

The paper examines the role of Public Employment Programs (PEPs) within South Africa's evolving social protection landscape, emphasizing their intersection with unemployment, inequality, and social policy. The study highlights structural inequalities—such as land dispossession, concentrated economic power, and spatial inequities—that perpetuate poverty and unemployment.



# Nos publications récentes sur les inégalités en Afrique du Sud



## The local economic development effects of income transfers in South Africa. The Social Relief of Distress grant

Following the onset of COVID-19 in April 2020, this qualitative study considered the effects of the Social Relief of Distress (SRD) grant on local economies in five urban and peri-urban locations in South Africa, through the perspectives of informal traders. In a context of acute inequality, the SRD was introduced at a time of economic, health and social crisis due to the onset of COVID and measures implemented to limit its spread and was a key policy mechanism intended to ameliorate the differential effects of these measures on vulnerable groups.

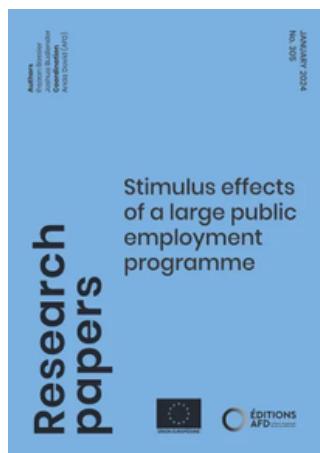


## Can Cash Transfers to the Unemployed Support Economic Activity? Evidence from South Africa

Persistently high unemployment has plagued South Africa over the last few decades, while concurrently there has been a dearth of state-provided income support to the working-age economically active population. In response to the pandemic the government introduced the COVID-19 Social Relief of Distress grant – the country's first unconditional cash transfer targeted at the unemployed. At the time of writing, however, no causal evidence of the grant's effects exist.



# Nos publications récentes sur les inégalités en Afrique du Sud



## Stimulus effects of a large public employment programme

What effect does government spending on social programmes have on private sector incomes and jobs? Policy-makers, especially in developing countries with low average incomes and productivity, often perceive a trade-off between alleviating poverty and unemployment directly with social assistance and public employment programmes, versus other resource allocation options intended to support economic growth and job creation with long-run benefits.



## Proposal for the extension, redesign, and repurposing of the SRD for the goal of poverty reduction

The study examines the special COVID-19 Social Relief of Distress grant (hereafter 'SRD') and provides recommendations to maximise its impact on poverty reduction. The SRD showed itself to be an excellent investment of government spending because it reduces poverty and can increase job search.

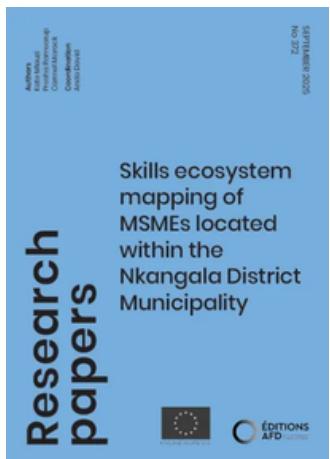


# Nos publications récentes sur les inégalités en Afrique du Sud



## Developing a Youth Labour Market Index for South Africa at the sub-national level

Assessing the labour market situation for young people is a critical area of research that has attracted the attention of scholars and policymakers globally. However, understanding the complexity of the labour market for youth, particularly in developing countries, requires a comprehensive, multidimensional approach. We address this need by developing a Youth Labour Market Index (YLM) for South Africa, incorporating ten indicators that capture the unique youth labour market situation from various perspectives.

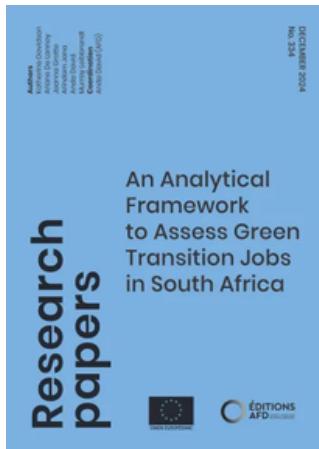


## Skills ecosystem mapping of MSMEs located within the Nkangala District Municipality

This paper examines the skills ecosystem for Micro, Small and Medium Enterprises (MSMEs) in Nkangala District Municipality (NDM), Mpumalanga—a coal-dependent region central to South Africa's Just Energy Transition (JET). Using a systemic framework, it maps local networks, policy alignment, and coordination shaping MSME development in an inclusive, low-carbon economy.

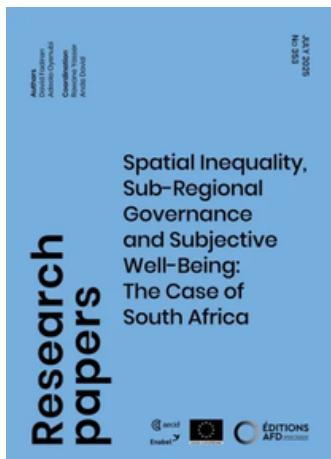


# Nos publications récentes sur les inégalités en Afrique du Sud



## An Analytical Framework to Assess Green Transition Jobs in South Africa

In this paper we propose an analytical framework for profiling workers who are likely to be impacted by the energy transition, based on what work they do and in which industry they work. By combining a bottom-up approach to identify occupations related to the green transition, with a top-down approach to identifying 'brown' industries, we arrive at a matrix that allows us to look at where on the nexus between green transition occupations, and brown industries, workers find themselves

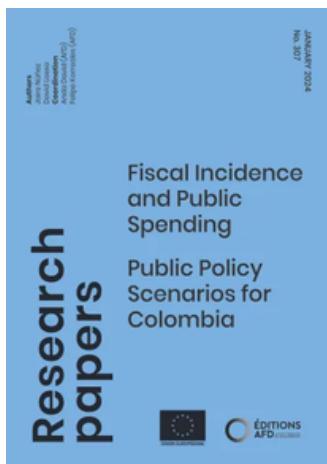


## Spatial Inequality, Sub-regional governance and Subjective Well-being - The case of South Africa

This paper examines how spatial variation in inequality and quality of institutions interact to explain variation in subjective wellbeing. Literature suggests that better institutions and lower level of inequality improve subjective wellbeing. However, evidence that examine how the interaction between these two variables explain variation in wellbeing is relatively scarce.



# Nos publications récentes sur les inégalités en Colombie et au Mexique



## Fiscal Incidence and Public Spending: Public Policy Scenarios for Colombia

In 2020, Colombia recorded the highest levels of inequality and poverty in the last decade. The increase in these indicators can be attributed to poorer labour market performance and the COVID-19 pandemic. In this context, this analysis examines these indicators using the fiscal incidence methodology developed by the Commitment to Equity Institute (CEQ), which makes it possible to identify the effect of tax structures and social spending in the country on poverty and inequality

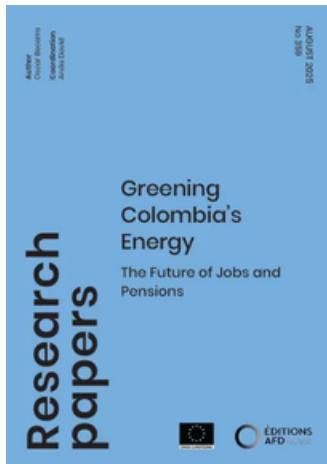


## Quantifying Green Job Potential in Colombia: A Task-Based Approach

This paper examines the impact of the green transition on the Colombian labor market. Using a task-based approach and data from the 2022 Colombian Household Survey, we find that approximately 22.6% of Colombian employment is linked to green tasks, with 15.9% directly affected by the green transition.



# Nos publications récentes sur les inégalités en Colombie et au Mexique



## Greening Colombia's Energy: The Future of Jobs and Pensions

This paper evaluates the effects of Colombia's transition to a low-carbon economy on employment and pensions. Utilizing a three-stage analysis integrating national energy scenarios, an input-output model, and a pension microsimulation model, we quantify the green transition's effects on employment and pensions.



## Distributive Impact of Green Taxes in Mexico

In Mexico, as in most countries globally, energy taxation, particularly through taxes on fuels, serves as the primary carbon pricing instrument.

This study quantifies the size and the distributive effects of green taxes (and anti-green subsidies) in Mexico, principally focusing on excise taxes (IEPS, from its initials in Spanish) levied on coal and fuels, as well as subsidies for residential electricity consumption.



# Nos publications récentes sur les inégalités en Colombie et au Mexique



## Social Mobility, Care Policies, and Social Protection

In this study, we shed light on the connections between social mobility and social protection related to care. The objective is to examine women's opportunities for choice and life achievements in terms of social mobility. In particular, it proposes a broader human development approach that, beyond education, health, and social security, integrates the contribution of both paid and unpaid care work to individuals' wellbeing and social mobility.



## Promoting a More Progressive Approach - Evaluating the Impact of Social and Fiscal Policies in Mexico and Colombia amidst the Covid-19 Pandemic

This research paper analyzes the redistributive impact of some fiscal policies and social programmes (direct taxes and transfers) before and after the pandemic crisis in Mexico and Colombia, following the CEQ methodology. It considers different concepts such as Market Income, Market Income plus Pensions and Disposable Income in order to analyze the impacts of fiscal policies and social programmes on inequality in these countries.



# Nos publications récentes sur les inégalités en Indonésie



## The Benefits of Marine Protected Areas in Fighting Inequality and Fostering Environmental Sustainability in Indonesia

This research paper aims to explore the potential benefits of marine protected areas (MPAs) and assess their impact on environmental sustainability and inequality in Indonesia.



## Balancing Conservation and Community Welfare: Enhancing the Management of Marine Protected Areas (MPAs) in Indonesia

This paper explores the dynamic of the MPAs management in Indonesia, focusing on how they have addressed not only issues related to the biodiversity conservation but also the welfare of the community who live near MPAs.



# Nos publications récentes sur les inégalités en Indonésie

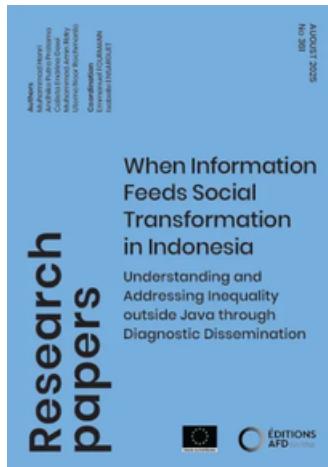


## Can social inclusion benefit ecosystems?



## Reconciling social and environmental challenges through better management of Marine Protected Areas (MPAs) in Indonesia

(Disponible en français)



# When Information Feeds Social Transformation in Indonesia: Understanding and Addressing Inequality outside Java through Diagnostic Dissemination



The findings of this report emphasize that inequality in Indonesia extends beyond income distribution, encompassing access to education, healthcare, infrastructure, and economic opportunities. These inequalities are further compounded by geographic isolation, governance challenges, exposure to natural disasters, and uneven economic transformation.

# Nos dialogues de politiques publiques

## POLICY DIALOGUES

Strengthening Public Employment Programmes in South Africa's Social Protection Framework

November 2024 • No. 881-00-407 Research Facility on Inequalities



South Africa faces an enduring unemployment crisis compounded by structural inequalities. Public Employment Programs (PEPs) play a critical role in addressing these challenges, offering income support and bridging gaps between social assistance and active labour market policies. Recent innovations, such as the introduction of a minimum wage and employment stimulus, present an opportunity to enhance PEPs' effectiveness. This brief outlines strategic directions to optimize PEPs within a cohesive social protection framework.



South Africa's unemployment rate stands at approximately 25%, with significant regional disparities. The informal sector, which accounts for nearly 60% of employment, remains a major source of income for many households. The government has implemented various measures to combat unemployment, including the National Minimum Wage and the Employment Stimulus. These efforts are part of a broader strategy to achieve economic growth and reduce poverty.



Recent policy changes have aimed to address the challenges faced by the informal sector and promote job creation. The introduction of a minimum wage is intended to provide a safety net for workers and encourage formalization of the informal economy.



The Employment Stimulus aims to create 1 million new jobs by 2026, focusing on sectors like agriculture, mining, and construction.



These changes offer immediate opportunities to reduce the gap between social assistance and active labour market policies. By integrating PEPs more closely with other social protection programs, we can create a more cohesive framework for addressing poverty and inequality.



Overall, the government's commitment to reducing unemployment and poverty is commendable. However, more needs to be done to ensure that all South Africans have access to decent work and a dignified life.



Future research should focus on evaluating the long-term impact of these interventions and identifying best practices for scaling up successful models.



In conclusion, while progress has been made, there is still much work to be done to achieve a truly inclusive and equitable society. By continuing to prioritize employment creation and social protection, South Africa can build a better future for all its citizens.



Author: Dr. John Doe  
Researcher: Dr. Jane Smith  
Editor: Dr. Michael Johnson  
Reviewers: Dr. Linda Williams, Dr. Richard Green



Published: August 2024 • No. 881-00-407 Research Facility on Inequalities

## POLICY DIALOGUES

Rethinking progress towards reducing inequalities in developing countries, while integrating climate change

August 2024 • No. 881-00-407 Research Facility on Inequalities



Progress in reducing inequalities (SDG10) has been measured against economic resources, but also other underlying factors like education, health, and gender equality. The global average shows that progress is slow, with only 50 percent of countries meeting SDG10 targets. This brief explores the role of climate change in both exacerbating and alleviating inequalities. It highlights the need for a holistic approach that considers environmental, social, and economic dimensions simultaneously. The study finds that while climate change poses significant challenges, it also presents opportunities for sustainable development and poverty reduction. The report concludes with recommendations for policy makers to integrate climate change into their inequality reduction strategies.



Discussions on quantifying progress towards SDG10 often focus on economic resources. This brief argues that a more comprehensive approach is needed to fully understand the impact of climate change on inequality.



It highlights the importance of considering the social and environmental costs of climate change, such as displacement and loss of life. The report emphasizes that a truly sustainable development model must take into account the needs of vulnerable populations and ensure that no one is left behind.



Overall, the brief concludes that a more integrated approach to SDG10 is required to effectively combat climate change and reduce inequalities.



Author: Dr. Jane Doe  
Researcher: Dr. Michael Johnson  
Editor: Dr. Linda Williams  
Reviewers: Dr. Richard Green



Published: August 2024 • No. 881-00-407 Research Facility on Inequalities

## POLICY DIALOGUES

Are Municipal Governance Issues Worsening the Effects of Inequality in South Africa?

January 2024 • No. 881-00-407 Research Facility on Inequalities



In South Africa, inequality is not just a national issue but is also deeply rooted in local governance structures. The legacy of apartheid, which enforced spatial segregation and exclusionary policies, continues to shape urban and rural areas. Today, traditional metrics like GDP and per capita income often fail to capture the lived experiences of individuals when measured at a local level. This brief argues that a more holistic approach is needed when considering inequality through the lens of municipal governance. We find that municipalities that offer significantly better starting conditions for their residents tend to have higher levels of economic and social development. This suggests that municipal governance plays a crucial role in understanding and addressing inequality.



To explore this further, we utilize the Spatial Income Dynamics (SID) methodology, which tracks household income over time. Our analysis shows that municipalities with better initial conditions for their residents tend to experience faster growth in income over time. This highlights the importance of acknowledging the unique challenges faced by different municipalities and the need for tailored policies to address them.



Overall, the brief concludes that municipal governance issues are a key factor in exacerbating or mitigating inequality. By addressing these issues, we can work towards a more equitable and sustainable future for all South Africans.



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## POLICY DIALOGUES

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## Strengthening Public Employment Programmes in South Africa's Social Protection Framework



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## Rethinking progress towards reducing inequalities in developing countries, while integrating climate change



Efforts of countries to reduce inequalities (SDG10) can be measured after incorporating their economic resources, but also after examining the effects of climate change on this global effort. On average, countries have exerted only 50 percent of their effort in reducing income inequality, but this effort differs from region to region. Sub Saharan Africa recorded the least average effort of 39%, reminding that the potential & scope for improvement to reduce income inequality differs across SSA countries.

## Are Municipal Governance Issues Worsening the Effects of Inequality in South Africa?

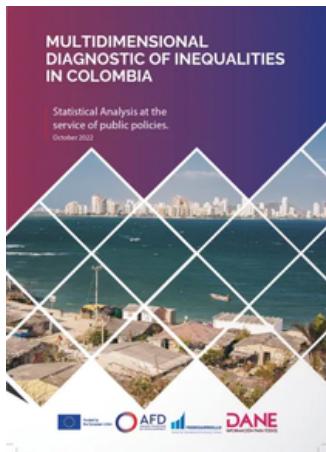


In South Africa, inequalities do not exist in isolation but are fundamentally shaped by spatial factors. The legacy of apartheid, which used spatial segregation to enforce exclusionary policies, continues to influence economic and social outcomes today. Traditional economic performance metrics such as GDP often fail to capture the lived experiences of individuals, particularly when measured at a national level. This brief argues that a more holistic approach is needed when considering inequality through the lens of municipal governance. We find that municipalities that offer significantly better starting conditions for their residents tend to have higher levels of economic and social development. This suggests that municipal governance plays a crucial role in understanding and addressing inequality. To explore this further, we utilize the Spatial Income Dynamics (SID) methodology, which tracks household income over time. Our analysis shows that municipalities with better initial conditions for their residents tend to experience faster growth in income over time. This highlights the importance of acknowledging the unique challenges faced by different municipalities and the need for tailored policies to address them. Overall, the brief concludes that municipal governance issues are a key factor in exacerbating or mitigating inequality. By addressing these issues, we can work towards a more equitable and sustainable future for all South Africans.

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# Nos Diagnostics Inégalités



## Multidimensional diagnostic on inequalities in Colombia



In brief, this Multidimensional Diagnostic is key to understanding the gaps that exist in Colombia, and allows for evidence-based decision-making and progress towards reducing inequalities. This document has been produced in the framework of the Extension of the Research Facility on Inequalities



## The Inequality Diagnostic Report: Indonesia

The Inequality Diagnostic Report measures multidimensional aspects of inequalities in Indonesia in the last decade, while also identifying policies that shape the current state of inequality in the country. The report analyzes inequalities in Indonesia from a comprehensive point of view, which takes into account its multiple dimensions such as income distribution, labour income, household assets and services, but also spatial inequality or gender disparities.

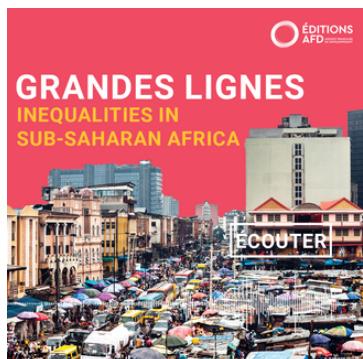


## En savoir plus sur le programme de recherche sur les inégalités

- La Facilité UE-AFD de recherche sur les inégalités 
- Première phase de la Facilité de recherche sur les inégalités (2017-2020) 
- L'Extension de la Facilité de recherche sur les inégalités 

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# Nos experts AFD sur les inégalités



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