

A Mixed Methods Exploration of Measurement, Impact and Strategy for Affirmative Action and Socio-economic Justice in the South African Financial Sector

Richard A. April¹, Cookie M. Govender²

¹PhD in Personal and Professional Leadership, Student-PhD, School of Management, University of Johannesburg, P.O. Box 524, Auckland Park, 2006 (South Africa)

✉ richardapril29@gmail.com

²(PhD): Education, Supervisor-PhD, School of Management, University of Johannesburg, P.O. Box 524, Auckland Park, 2006 (South Africa)

✉ cookieg@uj.ac.za

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Abstract:

Socioeconomic transformation in post-apartheid South Africa is regulated by affirmative action (AA) and employment equity legislation. This paper aims to empirically explore the measurement, impact, and strategy for affirmative action and workforce transformation in the South African financial sector. A mixed methods research design underpinned by the pragmatism paradigm and transformational leadership theory was employed. Purposive sampling was used to collect qualitative interview data (n = 20), then thematically analysed. Quantitative survey data using random sampling selection (n = 100) was factor analysed. These constructs were measured: AA measurement; AA perception; AA transformation; AA business impact; and

✦**Corresponding author:** School of Management, University of Johannesburg, P.O. Box 524, Auckland Park, 2006 (South Africa).

✉ richardapril29@gmail.com

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AA strategic framework. Qualitative findings indicate that AA targets are being measured as per legislation, yet transformation is slow and hindered by barriers. According to quantitative results, the AA strategy is essential. Management commitment is needed to represent all population groups in all jobs, frequently communicate about AA, transform previously disadvantaged women and young people, and create a diverse workforce that offers socioeconomic justice. The study adds to the body of knowledge on affirmative action, workforce transformation, and socioeconomic justice. The 10-step AA strategic management framework emerged as a practical contribution of the study.

Keywords: Affirmative Action Measurement, Affirmative Action Perception, Affirmative Action Transformation, Affirmative Action Strategy, Business Impact.

JEL Codes: J7, D63.

1. Introduction

Socioeconomic justice implies establishing balance after injustice, inequity, harm, or wrongdoing has been perpetrated on another. Redressing past imbalances in societies, workplaces, and political arenas call for a balanced transformational approach to create socioeconomic equity (Collins, 2018; Prys-Hansen, 2020). Policies, procedures and practices for socioeconomic transformation are legislated as affirmative action (hereafter, AA), transformational, redress and empowerment activities in countries across the globe (Ozdemir, 2021; Kim, 2022; Enworo & Njemanze, 2022). Countries such as China, the USA, Canada, Brazil, Malaysia, Nigeria, South Africa and Australia introduced AA laws to achieve equitable targets for redressing specific population groups (Collins, 2018; Berrey, 2018; Warikoo & Allen, 2020; Jonge, 2022). Global affirmative action policies aim to address injustices against people with disabilities, women, and minority groups. In South Africa, however, affirmative action was introduced to redress centuries of injustices against the majority black and other minority non-white population groups (Venter, 2018).

Before 1994, when the democratically elected government overturned the oppressive apartheid regime, white citizens in South Africa relished unjust political and socioeconomic benefits and opportunities. While the country's majority of black citizens and the minority of Coloured and Indian citizens were exploited, marginalised and oppressed in societies, workforces and the marketplace (Mbembe, 2007; Akala, 2019). Similarly, for centuries in the USA, the government established unjust ground rules and controlled entrances to employment and opportunities, thus preventing black Americans

from gaining access to socioeconomic development or advancement (Collins, 2018; Kim, 2022; Mbembe, 2007). Studies conducted 40 years after AA legislation was implemented reveal that the USA has not attained the socioeconomic demographic transformation and AA transition that policy and legislation intended (Nzukuma & Bussin, 2011; Love, 2019).

Affirmative action and employment equity terms are commonly applied to describe the established and social instruments governments use to change the labour force, making it more receptive to the target audience or recipients (Mbembe, 2007; Nconco, 2012). The concept of AA emanated in the USA. It can be defined as an orderly, deliberate procedure where the results of imperialism and ethnic inequity are being overturned in all parts of life (Nconco, 2012). AA is not about appointing or advancing incompetent applicants or having an institution tolerate unwarranted adversity; instead, it is about taking the steps required to confirm that able, previously disadvantaged individuals are employed, advanced and retained relatively in the workplace (Roman & Mason, 2015).

AA policy implementation may be slow; hence AA transformation is slow (Warikoo & Allen, 2020; Prys-Hansen, 2020). Rapid AA transformation in the workplace may be hindered by transactional rather than transformational management and leadership styles. Furthermore, AA plans, targets and reports may be inaccurately measured (Meshram, 2022). Trends reveal that AA perceptions are both optimistic and pessimistic. Despite slow progress, AA is perceived as good because AA has benefits in creating diverse, innovative workforces that meet local needs. AA promotes transformation and increases socioeconomic justice by redressing past discrimination and imbalances. Furthermore, positive AA impacts business strategy grows market share value and represents its customer population. Transformative leadership strategies that embrace a positive AA approach involve management commitment, visible transformation and achieved targets where previously disadvantaged individuals feel equal, supported, respected and empowered (Songa, 2021; Kamau, 2021).

There is a gap between AA policy design and implementation (Meshram, 2022). In particular, the issue of personal and professional leadership responsible for AA implementation with a transformational agenda became a focus of interest. As such, transformational leadership theory underpins this study. According to transformational leadership theory, leaders and managers execute workforce change and transformation by inspiring and motivating diverse employees to achieve maximum performance while complying with national transformational objectives (Venter, 2018; Siangchokyoo, Klinger & Champion, 2020; Kamau, 2021). The

research explored how AA benefits, transformation, business growth and strategy were measured and perceived in the South African financial sector, specifically the banking industry. Mixed methods research, employing quantitative and qualitative instruments and analysis, was used to explore this research question: What strategic management framework measures and enables positive and effective workforce AA perception, benefits, transformation and business impact that achieves socioeconomic justice?

2. Literature review

2.1. Measurement of AA

The measurement of AA is designed to assess whether organisations meet national and international legislative redress targets. On a global level, the measurement of AA occurs at a slower-than-expected rate, there is limited AA measurement, and the AA measurement is inaccurate (Prys-Hansen, 2020; Meshram, 2022). In the USA, the measurement of AA is accomplished via AA audit inputs and outputs, assessing whether state, federal and national legislative AA targets are achieved (Love, 2019; Dur, Pathak & Sönmez, 2020). Asian Americans have advanced in higher education due to AA policies despite the political economy of racism in the country. Multidimensional AA measurement models are advocated to accurately measure race and class transformations (Poon, Segoshi, Tang, Surla, Nguyen & Squire, 2019). In South Africa, organisations must submit national plans and reports annually, measuring how AA leads to transformation, how AA employees are trained, developed, and talent managed, and how AA is communicated to employees (Booyesen, 2007). Globally, the measurement of AA differs per country depending on the discrimination against disadvantaged groups, the level of retribution and corrective measures required to level the playing field, the reaction of previously advantaged groups, the choices and motivation of leaders and managers, and the algorithms of the measurement instruments and analysis (Booyesen, 2007; Kim, 2022; Singh, 2022).

Factors that impact AA measurement are effective skills, resources and motivation (Poon et al., 2019). Globalisation, ICT and 4IR have impacted AA measurement and may be a benefit and limitation for fair, reliable and valid AA measurement, especially in developing and underdeveloped countries such as South Africa. Furthermore, AA workforce and leadership appointments in developing nations are more likely linked to bribery and corruption, managers paying lip service to legislation, AA is not a strategic goal, and lack of 4IR and ICT resources and skills (Booyesen, 2007).

Inaccurate data capturing of AA targets, plans and reports may exacerbate the challenge of inaccurate AA measurements in most countries as centralised and decentralised systems, processes, procedures, and practices may differ within countries and continents (Meshram, 2022).

The benefits of accurate AA measurements are visible in diverse workforces, deliberate AA appointments, development and promotions, and efficient AA measurement strategies. Effective AA measurements in the countries of Nigeria, India and China reveal that AA leads to transformation, socioeconomic benefits to previously disadvantaged individuals, talent management of all occupations, effective AA risk management and mitigation, and transparent and successful communication of AA (Enworo & Njemanze, 2022; Ozdemir, 2021; Jonge, 2022).

2.2. Perceptions of AA

Both positive and negative perceptions of AA exist in the workplace globally. In the USA, positive transitional perceptions surround AA transformation that achieves social and economic justice for previously disadvantaged people (Collins, 2018; Poon et al., 2019; Joshi, 2020). AA measures of women serving as executives on management boards in China and India are largely ignored (Jonge, 2022). Whereas the previously disadvantaged individuals feel a sense of relief that their injustices are noticed and acted upon, the previously advantaged individuals feel a sense of guilt, shame and blame that affects their performance and motivation. In South Africa, when black, Coloured and Indian employees are deliberately recruited to occupy vacancies, AA is perceived to address historical workforce imbalances (Venter, 2018). In Canada, when AA interventions are designed to attract black youth and empower them as new talent, AA is perceived as effective. Organisations that proactively attract, train and retain blacks, women, youth and people with disabilities are positively perceived as employers to work for (Berrey, 2018).

Positive employee, management and customer perceptions of AA lead to diverse workforces that grow and thrive, attracting global talent and customers (Prys-Hansen, 2020). Negative perceptions of AA lead to local, national and continental brain drain, with a growing diaspora. Negative perceptions of AA stem from slow AA transformation amongst all occupational categories. Workforces with little or no AA transformation at executive, top and senior management levels have a low perception of AA effectiveness. Although some AA transformations may be visible in junior management levels and lower occupational jobs, the workforce perception of AA benefits is deemed little to none (Booysen, 2007).

Low employee perceptions are experienced when AA appointments are made due to bribery, corruption, tokenism, nepotism, and superficially complying with AA legislation without an ethical transformational intention. In most African countries, the perceptions of successful AAs are low due to the reasons above, including a lack of training, qualification and merit appointments (Akala, 2019). Although previously disadvantaged AA candidates are appointed to meet national legislative mandates, the socioeconomic power continues to rest in the hands of the previously advantaged white male individuals, businessmen and managers (Madonsela, 2020; Songa, 2021).

2.3. Benefits of AA

Despite the lack of proper measurement instruments and analysis mechanisms of AA transformation and the low and negative perception surrounding AA effectiveness, global trends reveal numerous AA benefits (Warikoo & Allen, 2020). Authentic, intentional, deliberate and ethical AA strategies create diverse, integrated workforces that thrive in global markets. In diverse workforces where AA is promoted and upheld, innovativeness and creativeness thrive through free-flowing ideas generated in safe workspaces. In the USA, Canada, India, Kenya and South Africa, when AA recruitment strategies target previously disadvantaged youth for talent management empowerment, they add value to business creativity with a unique perspective that increases business competitiveness (Love, 2019; Singh, 2022; Kim, 2022; Akala, 2019).

Societies and workplaces that promote previously disadvantaged individuals towards achieving socioeconomic justice with equitable opportunities eliminate AA barriers to create smart cities, smart workplaces and smart future leadership capabilities (Booyesen, 2007). Workforces benefit from effective, targeted AA strategies as they become equitably representative of their country's citizens. In societies where all citizens are represented at ownership, leadership, management, and all levels of the political structures, workforce and society, the politics, economics, and social interactions consistently evolve with multiple benefits to all (Berrey, 2018; Collins, 2018).

2.4. AA transformation

AA leads to transformation at all occupational levels and structures of society. AA redresses previous imbalances by transforming policies, procedures and practices towards providing more opportunities for those

previously disadvantaged (Dur et al., 2020). AA leads to leadership and management transformational opportunities and the education, training and development of previously disadvantaged leaders and managers. When authentic AA transformation occurs, there is a high level of transformation in women's leadership within structures of society and in the management of organisations and government. Radical AA transformation can lead to equitable pay for equitable work for all race groups, genders and ages. This would lead to socioeconomic justice, successful AA strategies and integrated workforces and societies (Madonsela, 2020; Songa, 2021).

Although AA legislation mandates radical transformation in the workplace and societies in South Africa, the transformation has been slow, complex, and has negative connotations and perceptions (Ozoemena, 2018). Furthermore, the legislated high level of AA transformation in top management positions in both public and private organisations has been riddled with unforeseen difficulties, challenges and risks (Ozdemir, 2021). Moreover, there is a continued disparity in pay levels amongst the different race and gender groups within public and private organisations, despite legislated transformational policies (Venter, 2018).

For AA transformation to work effectively and efficiently, ethical, transformational leadership initiatives must intentionally implement fair, reliable and valid AA (Akala, 2019). All occupations must engage with transformational objectives, aims and targets. Proactive AA transformation not only achieves social and economic justice for its citizen, but it also co-creates a collectively evolving consciousness for the well-being of all in all occupational categories and at all political and societal levels (Berrey, 2018).

2.5. AA impact on business strategy

AA increases business growth, allowing market share value to rise due to its diverse yet integrated and creative workforce. Deliberate and targeted AA allows for creating a diverse workforce by attracting the previously disadvantaged to engage with and become part of talent pools ready to fill emerging vacancies and succession plan positions. Business strategies focusing on AA policies and practices attract global talent contributing to business innovativeness, growth and competitiveness. Local and global talent pipelines are created using effective AA interventions, thus allowing business strategies to connect, expand and grow globally (Warikoo & Allen, 2020).

Business culture is impacted by effective AA practices, allowing divergent cultures to unify and integrate around a common business value system that promotes diversity. Organisational culture becomes enriched when AA is implemented strategically, authentically and ethically. When a

diversely integrated workforce embraces the business mission and vision, the business focus thrives with a strong competitive edge and a set of competencies and capabilities that rank high in global markets (Berrey, 2018; Songa, 2021).

Effective AA implementation impacts business strategy by drawing on a range of skills, competencies, capabilities, knowledge and values available in the community in which it exists. Smart business strategies focus on achieving the highest performance that rivals the excellence of its competitors. Smart businesses with diverse workforces create smart cities and villages with smart societies that produce smart goods, products and services for local, national and global consumption. Diverse workforces service diverse customer populations and attract diverse talent for future management and leadership positions (Dur et al., 2020).

2.6. Strategic transformation and affirmative action

There is a need for a simple yet effective and efficient strategic framework to implement AA positively in any workplace or society (Collins, 2018; Songa, 2021). Strategic AA allows for equitable redress of past imbalances, especially when all race groups were previously not visible at all occupational levels. Strategic AA begins with an effective and efficient multiple-channel communication strategy in place. Top management must commit to AA transformation in a visible way that reveals true, radical and action-orientated measures and targets for AA. AA transformation is perceived as strategic and effective when all racial groups and genders are visible in all occupational categories (Ozoemena, 2018; Madonsela. 2020). When AA candidates are targeted for education, training and development to accelerate their performance, creativity and innovativeness, then businesses can strategically create talent pools that are agile, adaptive and customer-orientated. Strategic transformational policies target previously disadvantaged citizens, especially the youth, to be empowered as future leaders, managers and entrepreneurs that should be mentored and coached (Dur et al., 2020; Joshi, 2020).

AA legislation, policies and practices are strategic when their implementation achieves socioeconomic justice for those previously disadvantaged, marginalised and oppressed. Strategic AA implementation results in a balanced society with balanced workforces that respect and care for its employees, managers, leaders and citizens. Achieving social and economic justice for all citizens, young and old, male or female, is a mark of advancing a country that builds trust, worthiness and credibility amongst its population and customers. Joshi (2020) and Singh (2022) advance different

paths and strategies for various socioeconomic factors that AA policies should consider, especially when legislating, measuring and evaluating AA implementation for socioeconomic justice.

3. Research method

The explanatory sequential mixed methods research design was employed. Qualitative interviews addressed the (what and why) questions, while the quantitative survey addressed the (how many) questions (Bryers, van Teijlingen & Pitchforth, 2014; Creswell, 2015). The pragmatism research paradigm underpinned this study, guiding what should be researched, how it should be researched, and how the research findings should be understood (Kivunja & Kuyini, 2017; Bryers et al., 2014).

The sample population, including both men and women from all racial, ethnic and cultural groups, was selected from a national bank consisting of 2720 employees. These occupational categories were targeted: top management, senior management; professionals, specialists and middle management; and skilled and qualified junior management. In phase 1, qualitative data was gathered from 20 participants using purposive sampling (Creswell, 2015). In phase 2, 20.2% (n = 550) were randomly selected to participate in the quantitative survey with a response rate of 18.2% (n = 100).

Semi-structured interviews provide flexibility, allowing participants to reply to open-ended questions (Doody & Noonan, 2013; McIntosh & Morse, 2015). The researcher-designed, self-administered survey questionnaire was reasonably simple to manage and collected large quantities of data at a low charge (Jones, Murphy, Edwards & James, 2008). Thematic and factor analysis was conducted to extract the findings (Fugard & Potts, 2015). Ethical considerations such as confidentiality, anonymity and safe data storage were adhered to throughout the study.

4. Findings

4.1. Theme 1: Measurement of affirmative action

Measurement of AA emerged as the first common theme with these three subthemes: Regulatory or Legal, Accountability, and Human Resources Management. Regulatory or legal means that private sector organisations and government institutions must comply with AA legislation and meet AA targets. Most participants (15 of 20) agreed that (targets measure AA). As stated in the voice of one participant:

More emphasis is placed on achieving targets than on AA measures ... AA measurements should include talent management, retention of black employees, provision of development and growth opportunities, and progress in the employment of more people living with disabilities. (P18, female, top manager).

Under the subtheme of Accountability, it is significant that many (9 of 20 participants) did not know how AA was measured. Some participants indicated that employment equity forms part of managers' performance contracts and key result areas (KRA's), which is part of Accountability. As stated in the voice of 1 participant:

There is a definite measurement ... I do not know the specific measurements on hand. (P12, female, senior manager)

4.2. Theme 2: Perceptions of affirmative action

Perceptions of affirmative action emerged as a second common theme, with negative and positive perceptions emerging as key subthemes. Positive perceptions refer to AA's positive attributes that participants think will assist organisations in implementing AA. Most participants (14 of 20) stated that AA is positive. It was clarified that AA is positive for black non-white employees, as AA was legislated to redress past imbalances. This message comes through in the voice of this participant:

Most black people regard affirmative action as positive ... some black people do not apply for roles where the advert states that it is an affirmative action position as there is a stigma ... On the other hand, white men regard affirmative action as a swear word. (P18, female, top manager)

Negative perceptions refer to all participants' negative statements regarding implementing AA. Most participants (12 of 20) indicated that AA is perceived as (implementation not practical) and that transformation is too slow. The voices of these two participants capture this negative perception:

AA is not yet effective ... the pace of transformation is still too slow. (P4, female, junior manager)

Implementing it is not successful ... I do not believe that talented, qualified, previously disadvantaged individuals are given the opportunities they deserve. (P9, male, junior manager)

There are negative perceptions around the evidence that (top leadership is still white). Participants negatively perceive AA as the redress of issues of equity, transformation, and a more representative workforce where the majority black and women population hold top management positions is still elusive. Imbalances, lack of support and maintenance of white managers dominate the workplace, as stated in the voices of these two participants:

Many imbalances ... especially at the top management level, exist ... top management roles are still predominantly filled by white males. (P13, male, junior manager)

blacks have been set up for failure ... They have been promoted to senior positions without ... support ... whites are still mostly occupying senior positions. (P20, male, middle manager)

4.3. Theme 3: Benefits of affirmative action

The benefits of AA emerged as the third central theme with these three subthemes (human imperative, business imperative, and economic imperative). The business imperative refers to what the organisation can gain if it transforms and embraces AA. A key benefit of AA is that some transformation is happening where managers aim to (achieve BEE [black economic empowerment] and AA targets). It is a significant finding that 12 of the 20 participants stated that AA assisted banks in meeting their AA targets. This participant emphasises the need to have the majority and other population groups in management positions besides white managers:

Equitable representation across all segments can be achieved ... Meeting of BEE targets...if you only look after whites, you will only reach a small population. (P17, female, middle manager)

A key benefit is the increase of customers via AA interventions where the banks can (gain business from blacks). Furthermore, the banks will gain more business if it complies with legislation and implements AA, as government tenders have black economic empowerment as a prerequisite requirement. This message is clearly stated in the voice of this participant:

To tender and to do business with ... mining and the public sector banks must be BEE compliant. (P12, female senior manager)

4.4. Theme 4: Transformational levels of affirmative action

Transformative levels of AA emerged as the fourth theme with these three subthemes: barriers and problems, hostile work environment, and levels of transformation. Barriers and problems refer to how transformation is prevented by managers who are unmotivated and unskilled in handling transformation issues. A hostile work environment refers to white managers bypassing legislative imperatives and dominating black employees. Levels of transformation refer to how much AA has transformed the workplace and workforce, allowing the majority of black and women, other minority non-white population groups, and people with disability to enter into equitable employment.

As per the findings, blacks continue to experience employment barriers, problems and obstacles. The workplace is perceived as hostile as discrimination from white colleagues towards black and other race groups continues, even after 25 years of AA and employment equity legislation. The AA level is deemed by 15 of the 20 participants as a (slow pace of transformation), indicating that banks in South Africa have failed to transform the workforce. At senior and top management levels. This sentiment is captured in the voice of this participant:

Transformation targets ... not ... met fully ... upper and middle management has been prolonged to reach targets ... whites are looking after themselves ... job specifications ... manipulated. (P17, female, middle manager)

Slow workforce transformational levels are evident at management levels. There is (little change at the top) as per participant views. Some transformation is reported at the junior manager level, yet little or no transformation and previously disadvantaged AA managers are appointed at middle and top management levels. The voice of this participant expresses this view:

Whites are overrepresented ... consist of 90% of top management ... Line managers ... setting ... own targets ... unable to meet ... own targets ... Corporate South Africa ... failed to transform the workplace. (P15, female, top manager)

4.5. Theme 5: Impact on business strategy

Impact on business strategy is the fifth main theme with these four subthemes (creative workforce; moral case; business image; and top management commitment). Creative workforce refers to AA has enabled organisations to employ a diverse workforce, stimulating innovation. Participants claim that banks could increase their capital value and (attain growth and market share) directly by meeting AA targets and having a diverse workforce. This theme is encapsulated in the voice of this participant, who indicates that banks do comply with the basics of AA legislation to gain government and other tenders:

Banks must be BEE compliant...to tender for business with the government and mining industry. (P12, female, senior manager)

Implementing AA in banks impacts business strategy as a creative workforce enables banks to (design innovative products) for predominantly black and women customers. Banks make a moral case for diversity inclusion and AA transformation, claiming they meet local customer needs. Having a somewhat diverse workforce means that banks comply with the basics of AA legislation. Even if top management's commitment to authentic AA transformation is slow and largely lacking, banks boost their business profits and image by having a diverse customer base. The responses of these participants supported this finding:

Affirmative action ... assisted banks in tapping into different markets ... enabled banks to develop innovative products. (P1, male, middle manager)

Banks have become more innovative by introducing E-wallets ... unbanked customers are now catered for. (P19, female, top management)

4.6. Theme 6: Strategic AA framework

The strategic framework is the sixth central theme with these five subthemes: support from top management; HR strategy and planning; accelerated transformation; private and public sector involvement; and demographic representation. Strategically, banks lack proper planning, action and engagement with AA imperatives for transforming the country's workforce. The business strategy does not include HR as the custodian of AA

interventions, where HR and line managers are called to (train, coach, and upskill staff).

Top management should support talent management and accelerated development of previously disadvantaged individuals. Banks, as the private sector, should partner with the government, and the public sector, to enable smooth transformation so that banking staff in all occupational categories democratically represent the country's citizens. This message comes through the voices of these participants:

... Invest more in mentorship programs for affirmative action candidates
... They must be exposed to more strategic positions ... In the past, people were set up for failure. (P3, male, middle manager)

Skills development must be implemented to identify and nurture the right talent for the job ... (P13, male, junior manager)

Managers should formulate, implement and evaluate their AA strategy; it should be transparently communicated to all employees and the public. Strategic AA goals, targets, purpose and action plans should become a business imperative until all jobs in banks are equally and easily assessable to allow previously disadvantaged individuals to apply, be appointed and be retained. This participant emphasises the need for a strategic AA management framework in this quote:

The banks must be transparent regarding their affirmative action strategy, goals, reasons and criteria to appoint people to senior positions. (P14, female, junior manager)

The quantitative findings from Phase 2 of the study, detailed below, support the qualitative findings from Phase 1, as was previously stated. The quantitative survey analysis produced these six factors: AA measurement; AA perceptions; AA benefits; AA transformation; AA impact on business strategy; and AA strategic framework. The mean and standard deviation scores for these factors are now presented. These findings are based on a 5-point Likert scale. Respondents rated their responses to close-ended statements in the questionnaire using this scale: 1 = Strongly Disagree, 2 = Disagree, 3 = Neutral, 4 = Agree, and 5 = Strongly Agree. The highest and lowest scores are discussed for each of the six factors.

4.7. Factor 1: AA measurement

The variables or items with the highest mean scores for Factor 1, AA Measurement, ranged from $M = 3.61$ to $M = 3.56$. Item (Affirmative action leads to transformation) attained the highest mean ($M = 3.61$, $SD = 1.118$). This is a significant finding because 64% of the respondents agreed or strongly agreed with the statement. While 44 (44%) of the respondents agreed, 20 (20%) strongly agreed with this statement. Item (My organisation encourages racial diversity) attained the second-highest mean score ($M = 3.57$, $SD = 1.085$). This reveals that in total, 61% agreed that diversity is measured 43 (43%) of respondents agreed, 18 (18%) strongly agreed, and 23 (23%) were neutral. Item (Employment Equity reports are submitted to the Department of Labour (DOL)) attained the third highest mean score ($M = 3.56$, $SD = 0.808$). This finding signifies that participant responses to this question were mostly neutral, indicating that the measuring of AA may not be communicated clearly to employees.

Item (AA is regularly communicated to employees) obtained the lowest mean score ($M = 2.46$, $SD = 0.993$). This signifies that 70% of the respondents did not agree that AA is communicated regularly, as 36 (36.4%) disagreed, 17 (17.2%) strongly disagreed, and 31 (31.3%) were neutral. The item (AA employees are talent managed) received the second lowest mean score ($M = 2.93$, $SD = 0.956$), indicating that previously disadvantaged individuals are not targeted as a potential talent that can benefit the workforce. The item (Measurement of Affirmative action) received the third lowest score ($M = 3.21$, $SD = 1.005$), indicating that the measuring of AA may not be transparent, communicated or strategic to the organisation.

4.8. Factor 2: AA perceptions

The mean scores for the variables with the highest mean scores for Factor 2, AA Perceptions, ranged from $M = 3.63$ to $M = 3.40$. Item (black employees are recruited to occupy vacancies) attained the highest mean score ($M = 3.63$, $SD = 0.887$). This is significant as 60% of the respondents believed that previously disadvantaged individuals were being appointed in vacancies. While 46 (46.5%) of the respondents agreed with this finding, 14 (14.1%) strongly agreed, and 28 (28.3%) were neutral. Item (Affirmative action addresses historical workforce imbalances) obtained the second-highest mean score ($M = 3.49$, $SD = 1.110$). This reveals that, in total, 56% supported the view that AA redresses past imbalances. While 38 (38.4%) of respondents agreed, 18 (18.2%) strongly agreed, and 23 (23.2%) were neutral on this variable. Item (Affirmative action attracts our black youth as new talent)

achieved the third highest mean score ($M = 3.40$, $SD = 1.106$). This signifies that 54% of the respondents supported the view that previously disadvantaged youth are being talent-managed. While 40 (40.4%) of the respondents agreed with this finding, 14 (14.1%) strongly agreed, and 23 (23.2%) were neutral.

Item (Affirmative action is positively perceived in my organisation) attained the lowest mean score ($M = 2.97$, $SD = 0.984$). This reveals that, in total, 68% either disagreed or were unsure whether AA was positively perceived in the banks. While 24 (24.2%) disagreed, 7 (7.1%) strongly disagreed, and the majority, 37 (37.1%), were neutral. Item (My organisation proactively retains black employees) received the second lowest mean score ($M = 3.01$, $SD = 0.974$). This indicates that 71% of respondents did not support the view that previously disadvantaged employees were retained by banks. While 24 (24.2%) disagreed and 5 (5.1%) strongly disagreed, the majority, 42 (42.4%), were neutral. The general responses to Factor 2, AA Perceptions, averaged $M = 3.24$, $SD = 1.011$.

4.9. Factor 3: AA benefits

The mean scores for the variables with the highest mean scores for Factor 3, AA Benefits, ranged from $M = 3.80$ to $M = 3.66$, and the overall mean score for this factor was $M = 3.71$, $SD = 0.901$. The survey item (Affirmative action creates a diverse, integrated workforce) received the highest mean score ($M = 3.80$, $SD = 0.880$). This is a significant finding because 73% of the respondents supported the view that AA created a diverse yet integrated workforce for banks. While 56 (56.6%) of the respondents agreed and 17 (17.2%) agreed, 17 (17.2%) were neutral.

Item (Affirmative action promotes diverse and creative ideas) obtained the second-highest mean score ($M = 3.69$, $SD = 0.976$). This reveals that 64% supported the view that AA promotes workforce creativity. While 46 (46.5%) of respondents agreed and 18 (18.2%) strongly agreed, 25 (25.3%) were neutral. The survey item (Affirmative action recruitment targets black youth) attained the third-highest mean score ($M = 3.66$, $SD = 0.849$). This signifies that 63% supported the view that AA benefits included recruiting previously disadvantaged youth. While 50 (51%) of the respondents agreed, 13 (13.3%) strongly agreed, and 24 (24.5%) were neutral on this variable.

4.10. Factor 4: AA transformation

The general responses to Factor 4, AA Transformation, variables averaged $M = 3.59$ and $SD = 0.985$. The variable (High level of

transformation in women leadership) attained the highest mean score ($M = 3.19$, $SD = 1.089$). This is a significant finding due to 49% supporting the view that AA leads to transformation. While 43 (43%) of the respondents agreed, 6 (6%) strongly agreed, and 24 (24%) were neutral. The item (There is a recruitment strategy for attracting black employees within my organisation) attained the second-highest mean score ($M = 3.08$, $SD = 0.981$). This is a significant finding because only 36% support the view that previously disadvantaged individuals were deliberately recruited in banks. While 31 (31%) agreed, only 5 (5%) strongly agreed, and the majority, 37 (37%), were neutral on this variable.

The variable's lowest mean score was detected (Equality in pay levels amongst the different races) ($M = 2.56$, $SD = 1.145$). Significantly, 82% of respondents did not support the view that there was equity in remuneration for all race groups of employees in the banks, alluding to the socioeconomic disparity in the workforce. While 21 (21.2%) of respondents disagreed, 23 (23.2%) strongly disagreed, and 38 (38.4%) were neutral on this variable. Item (High level of affirmative action transformation in top management positions) attained the second lowest mean score ($M = 2.62$, $SD = 1.080$). This signifies that 74% of respondents refuted the view that previously disadvantaged individuals were visible at top management levels in banks. While 34 (34%) of the respondents disagreed and 16 (16%) strongly disagreed, 24 (24%) were neutral on this variable.

4.11. Factor 5: AA impact on business strategy

The item (Affirmative action created our diverse workforce) attained the highest mean score ($M = 3.54$, $SD = 0.858$). This is a significant finding because 60% of respondents believe AA created workforce diversity. While 53 (53%) of the respondents agreed, 7 (17.2%) strongly agreed, and 31 (31%) were neutral. The survey item (Organisational culture enriched due to affirmative action) attained the second-highest mean score ($M = 3.31$, $SD = 0.929$). This reveals that, in total, 46% of respondents supported the view that AA enriches workforce culture. While 40 (40%) of respondents agreed, 6 (6%) strongly agreed, and 38 (38%) were neutral. Item (Affirmative action implementation increased our growth and market share) achieved the third highest mean score ($M = 3.23$, $SD = 0.897$). This indicates that 40% supported the view that AA increased business market value. While the majority, 42 (42%) of the respondents were neutral, 35 (35%) agreed, and 5 (5%) strongly agreed on this variable.

4.12. Factor 6: AA strategic framework

The highest mean scores for the variables for Factor 6, AA Strategic Framework, ranged from $M = 4.49$ to $M = 4.29$. Survey item (All race groups should be visible in all occupational levels) obtained the highest mean score ($M = 4.49$, $SD = 0.847$). This is a significant finding because 94% of respondents believe that previously disadvantaged and advantaged individuals should become eligible for jobs in any occupational category. While 62 (62%) strongly agreed, 32 (32%) agreed, and 2 (2%) were neutral on this variable. Item (There should be an affirmative action communication strategy) attained the second highest mean score ($M = 4.34$, $SD = 0.768$). This reveals that 46 (46%) of respondents agreed, and 6 (6%) were neutral on this variable.

The survey item (Top management must commit to affirmative action transformation) attained the third highest mean score ($M = 4.29$, $SD = 0.844$). This indicates that 89% of respondents believed that top managers in banks must support AA transformation. While 43 (43%) of the respondents agreed, 46 (46%) strongly agreed, and 7 (7%) were neutral on this variable. Item (Transformational policies should target black females) attained the lowest mean score of $M = 3.79$ and $SD = 1.052$. This suggests that 65% of respondents supported that previously disadvantaged women should become the target for bank transformational interventions. While 37 (37.4%) of the respondents agreed and 28 (28.3%) strongly agreed, 22 (22.2%) were neutral on this variable. The survey item (Transformational policies should target black youth) attained the second lowest mean score of $M = 3.95$, $SD = 1.048$. This infers that 72% of respondents believed AA policies should target previously disadvantaged youth for transformational interventions. While 36 (36%) of the respondents strongly agreed and 36 (36%) agreed, 18 (18%) were neutral on this variable.

5. Discussion

Theme 1, AA Measurement, and theme 4, AA Transformation, emerged as highly significant, with participants indicating that AA is measured by target setting as per government legislation, despite the uncertainty surrounding how targets are set and measured or who is accountable for measurements. Previous studies reveal that employees feel respected in workplaces that achieve employment equity through socioeconomic redress as per national AA and justice imperatives (Songa, 2021; Kamau, 2021; Meshram, 2022; Kim, 2022). Literature reveals that AA transformation is slow despite government interventions (Warikoo & Allen, 2020; Prys-Hansen, 2020).

Significant findings also indicate that perceptions of AA differ depending on how leaders and managers embrace socioeconomic transformation for all population groups as per literature trends (Collins, 2018; Venter, 2018; Poon et al., 2019; Joshi, 2020). Strategic AA benefits organisations by diversifying the workforce and increasing its competitive advantage (Love, 2019; Singh, 2022; Kim, 2022; Akala, 2019). AA strategy should be communicated regularly to the workforce, indicating AA targets set and achieved. (Collins, 2018; Joshi, 2020; Songa, 2021; Singh, 2022). Strategic AA does impact business, employees and customers positively (Berrey, 2018; Warikoo & Allen, 2020; Songa, 2021).

Significant quantitative findings reveal that effective transformational strategies are imperative for these variables: previously disadvantaged and advantaged individuals are eligible for all jobs; good AA communication; management commitment to AA; AA transforms the youth; and AA targets females. Previous studies reveal that positive, effective and efficient AA strategy benefits and transforms the workforce towards socioeconomic balance and justice (Collins, 2018; Ozoemena, 2018; Songa, 2021; Joshi, 2020). Affirmative action commitment is significant for transforming local, national and global economies and instituting workforce balance and socioeconomic justice for societies (Berrey, 2018; Akala, 2019; Love, 2019; Kim, 2022). Literature trends indicate that positive AA perceptions, attitudes and values lead to radical and effective socioeconomic transformation that can be measured accurately (Kamau, 2021; Songa, 2021; Kim, 2022; Meshram, 2022).

The epistemological contribution of this paper is the proposed 10-Step AA Strategic Transformational Framework to accelerate AA transformation, employment equity and socioeconomic justice in the workforce, as presented in Table 1.

Table 1. 10-step affirmative action strategic transformational framework

		AA transformational framework	
Step	Action	Resl	Responsible stakeholders
		Organisation	National International
1	Comply with AA legislation	HRM and top managers	Department of labour (DOL/ government) International labour organisation (ILO)
2	Measure AA implementation	HR and line managers (LMs)	Department of labour ILO and international sector affiliations
3	Increase AA targets	LMs and recruitment	Department of labour ILO and international sector affiliations
4	Diversify and transform the entire workforce	HRM and top managers	Sector authorities ILO and international sector affiliations

5	Align AA with business strategy	HRM and top and middle managers	Sector and auditing authorities	ILO and international sector affiliations
6	Commit to and communicate AA strategy to all	All managers	Sector authorities	ILO and international sector affiliations
7	Train and develop AA employees and managers	HRD and LMs and employees and training providers	Sector and training authorities	ILO and international sector affiliations
8	Promote AA candidates via succession planning	LMs and employees and talent manager	DOL and sector authorities	ILO and international sector affiliations
9	Identify and manage transformational challenges	HR and middle managers	DOL and sector and auditing authorities	ILO and international sector affiliations
10	Total quality management of workforce transformation	HRM and all managers	DOL and sector and auditing authorities	ILO and international sector affiliations

Step 1 (Comply with AA legislation): AA legislation promotes fair labour practices and social justice in the workplace.

Step 2 (Measuring AA implementation) obliges designated employers to act positively to accelerate diversity, transformation and economic justice.

Step 3 (Increase AA targets): AA and employment equity aim to meet targets and eliminate past workplace discrimination practices.

Step 4 (Diversify and transform the entire workforce), AA benefits include achieving a diverse workforce broadly representative of the local population.

Step 5 (Align AA with business strategy), the organisation's strategic, tactical business goals thrive on ensuring that the working atmosphere is favourable and helpful to the programmes, measures and procedures supporting AA and transformational initiatives.

Step 6 (Commit to and communicate AA strategy to all), communicating the AA strategy to all roles internally and externally is vital in accelerating business success.

Step 7 (Train and develop AA employees and managers), AA candidates should be targeted for training and development to improve business performance and standards.

Step 8 (Promote AA candidates via succession planning) strategically aligned business and AA plans ensure AA candidates are selected for internal succession planning while increasing workforce diversity.

Step 9 (Identify and manage transformational challenges), barriers to the successful implementation of AA must be managed.

Step 10 (Total quality management of workforce transformation), strategic AA ensures total quality management of business workforce diversity integration, including AA policies, procedures, processes, systems and practices.

6. Conclusion

Globally, countries legislate AA policies and practices to establish workforce diversity, redress past workplace injustices and promote previously disadvantaged population groups towards socioeconomic balance. Although AA may be regulated and measured, the expected workforce transformation and employment equity are not happening as per planned targets. This research explored the pace of AA, transformation and socioeconomic justice in the South African financial context. Findings revealed that these themes and factors are crucial for effective, efficient and strategic AA implementation: AA measurement; AA perception; AA benefits; AA transformation, AA business impact; and AA strategy. The study has implications for theory, research and practice.

The 10-step AA strategic framework proposes that local, national and international leaders, managers, employers, employees, government and key stakeholders should be involved in the tactical implementation and measurement of AA in the workplace. Further research is recommended on a larger sample and various countries to explore AA policy implementation globally, especially where gross violations continue perpetrating towards population groups.

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