

# South Africa: Expanding into diverse initiatives

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Table 13: Selected Indicators for South Africa

<i>Indicator</i>	<i>Year</i>	<i>Number</i>
Population	1996	40.6 million
% of population which is female	1996	52%
% of population which is urban	1996	54%
Gross domestic product (GDP) per capita (US\$)	1999	8,908
Human development index (HDI)	1999	0.702
Gender development index (GDI)	1999	0.695
% of total budget funded by donors	1998	2%
% of national parliamentarians who are women	2002	30%

## Introduction

South Africa was one of the first countries to have a gender budget initiative. While Australia's initiative was introduced in the mid-1980s, it was only in the middle of the next decade – in 1995 – that initiatives emerged in other countries, namely in the Philippines and South Africa. In Australia and the Philippines, the initiative was based inside government. In South Africa, the initiative began outside government, as a collaborative venture of women parliamentarians and non-governmental organisations (NGOs). The collaboration became known as the Women's Budget Initiative (WBI).

The development of the core South African initiative has been described elsewhere. (See, for example, Budlender, 2000.) The WBI has also produced a range of publications which record the findings of its research. This chapter will not repeat what has been covered before except insofar as it provides background for what we describe here. Instead, it focuses on an aspect in which the South African situation differs from that in many other countries, namely the extent to which the idea of the gender budget approach has taken root beyond the core

initiative. To name just one example, gender budget analysis is included in curricula at several South African universities, with the WBI's books as prescribed reading.

The developments described in this chapter were not foreseen when the partners embarked on the gender budget journey in 1995. Indeed, at the outset the project was seen very much as an experimental project – one that might be abandoned if it proved impossible or unfruitful. The approach used in the first pilot year did, however, plant the seeds for later developments. In particular, the core partners in the WBI involved a number of different stakeholders in the initiative from the start. The core partners did not do the research themselves but instead approached people in NGOs and academia with knowledge of the different sectors to do it. Further, they set up an advisory team of people with sectoral and other relevant knowledge. When the first year's research was complete and compiled into a report, the publication was launched through a well-attended event which was opened by the Deputy Minister of Finance and attended by a wide range of stakeholders.

The original WBI was conceived as a research and advocacy initiative. Basically, the NGO partners would be primarily responsible for research which revealed gender aspects of policy and related budgets, and parliamentarians would use the findings to advocate for a better deal. As the initiative developed, however, we perceived both the shortcomings in this original conception and a range of possibilities which had not been seen at the beginning. In this chapter we look at four different ways in which gender budget work has expanded beyond the original players and beyond the original products.

Section 1 looks at the development of workshop materials. We consider this important as, while workshops are a common feature of virtually all gender budget initiatives, there has been very little focused activity on generating materials. Section 2 looks at gender budget work focused on violence against women. We include this to illustrate how this work, rather than starting with a focus defined by how government is organised – for example a ministry – can start with a 'problem' or gender issue. Section-3 looks at province-based work. The experience described in this section is a pointer, firstly, to the importance of looking at subnational budgets in a situation where much of the spending occurs in these decentralised units. Secondly, the particular experience described here shows both the possibilities and difficulties of working with legislatures. Finally, section 4 looks at

revenue. Again, we include this because it is an under-explored aspect of gender budget work. Further, even where countries have looked at revenue, the analysis has usually been confined to taxation.

## Development of Workshop Materials

### Why produce workshop materials?

The first concrete product of the South African WBI was a book containing the analysis of a selection of sectoral budgets, public sector employment and taxation. *The Women's Budget* (Budlender, ed., 1996) contained seven chapters. Authors were asked to keep their chapters to a maximum of thirty pages in simple, non-academic language. Editing attempted to ensure that the product was not seen as an academic, inaccessible tome. The subsequent Women's Budget books followed the same format and style.

Despite our attempts at simplicity, we suspected that few people read our research work in this form. Of those who read it, the majority were probably people with higher education, rather than the broader audience we hoped to reach. In particular, we knew that South Africa has no educational qualifications for becoming a member of parliament. We would thus be missing many of our immediate partners.

Our first attempt to remedy the situation was a set of *Money Matters* publications (see, for example, Hurt & Budlender, eds., 1998). These books took the material from the longer books, but converted each chapter into ten pages of simple English. The publication was also illustrated with photographs. In adapting the material, our target audience was someone with ten years of education whose first language was not English. In 2001, we went further and translated the *Money Matters* version of the chapter on customs and excise (see below) into three indigenous languages. This last product was disseminated through trade unions for whom customs and excise was a key issue. In particular, we targeted the clothing and textile workers' union.

*Money Matters* proved more popular than the *Women's Budget* series. But we still felt that we were not reaching our full potential audience. Even the shorter, simpler books had to contend with a public that had a weak reading culture and that was not in the habit of purchasing books. A far more common activity for our target audiences was attending workshops.

## The process of producing the materials for South Africa

The WBI therefore teamed up with a gender training organisation, the Gender Education and Training Network (GETNET), with the express aim of producing a set of gender budget workshop materials. The partnership obtained funding from the gender project of the German technical cooperation agency (GTZ) to produce a set of materials that would help people understand the concepts, approach and findings of the WBI's work.

As with our other activities, the WBI and GETNET did not work alone on this project. We brought together a team of adult educators, materials developers and some of the researchers from the WBI. We kicked off the project with a workshop at which we decided on the topics that would need to be addressed and possible exercises. We agreed that our target audience would be people with training skills so that we would not have to cover the basics of training. We decided that we would restrict the general section on gender as there were several other workbooks from which one could obtain exercises for gender training. We were anxious not to duplicate that work and to keep our own materials down to a manageable size.

The work was divided up between participants, who after the workshop worked on their sections on their own. In a second workshop we then went through and tested some of what had been produced. After a final editing process, we advertised for organisations prepared to test some of the materials and provide feedback. We made some further changes on the basis of the feedback and produced the final product. Each participant received a small payment for participating in the workshop and work done afterwards, but most of the work was unpaid.

The final product, which we also called *Money Matters*, took the form of a folder divided into three modules. These modules were further sub-divided into a number of sessions. Each session contained the objectives of the session, information as to time and materials needed, detailed instructions for each of the exercises, and all handouts required for the exercises. After some debate as to the desirability of colour coding of sections, we decided to produce everything on white paper so as to facilitate photocopying.

We saw the set of materials as a 'mix-and-match' pack. We did not expect any workshop to go through all the material. Rather, we hoped that trainers would be able to select particular sessions and exercises,

and integrate them into workshops on gender, on budgets, on particular sectors, on advocacy, and so on.

The materials were expressly tailored towards a civil society audience, or one made up of public representatives. This target informed both the tone and what we covered. For example, the final module of the materials focused on advocacy. A separate manual (Budlender & Sharp, 1998), commissioned by the Commonwealth Secretariat, had government as its audience as it grew out of the Secretariat's pilot gender budget initiatives based in government. In practice, however, sections of the *Money Matters* workshop materials have been used in training civil servants both in South Africa and beyond.

### Producing materials for the Southern African region

The materials we had produced were targeted at a South African audience. Their South African-ness was apparent in virtually all sessions, but more evident in some than others. For example, the sessions on gender made reference to the South African constitution's emphasis on equality; the sessions on parliament described the composition and functioning of the national and provincial legislatures; the sessions on the budget process described the different bodies included in the process; the sessions on intergovernmental relations described the functions of national, provincial and local government and how money flowed between them; and the session on advocacy used examples of past struggles in the country.

Despite the South African focus, many exercises worked well when used in other countries, although in most cases at least some adaptation was necessary. As it became evident that the international interest in gender budget work was unlikely to diminish in the short term, GETNET and WBI had the idea of working together with others in the Southern African Development Community (SADC) to produce a set of materials adapted for the different country situations.

Although several potential donors were keen that we work with all countries in the region, we decided that, as this was an experiment and because we had limited capacity because of other work, we should begin with a subset of SADC countries. We chose countries where we had contacts or where we knew that gender budget work had already begun. Our target countries at the start of the initiative were thus Botswana, Mozambique, Namibia, Zambia and Zimbabwe. The UNIFEM regional office in Harare agreed to fund the work.

We invited two researchers from each of the countries to a three-day workshop in Cape Town. Before the workshop we went through the materials and identified the exercises and handouts which might need adaptation. The full set of materials, together with this list, was sent to each team of researchers. Their 'homework' before the workshop was to attempt to collect the relevant information.

The process did not go as smoothly as we had hoped. Firstly, not all the teams did the homework. At least one reason was that we did not recognise the extent to which participants would need background information and understanding of gender budget work to be able to undertake the task. Secondly, by selecting only researchers for this workshop, we underestimated the extent to which an understanding of adult education, training and materials development was necessary. Thirdly, we assumed that participants would be prepared to do the work for the same minimal payments as the South Africans had done. This assumption was not correct in respect of everyone.

In planning the workshop, we had foreseen that we would use it to work further on the homework, and that participants would then return home to fill in missing information. We proceeded with this plan, even though it was clear that for most countries the work would involve much more than filling in a little bit of information. Because of our mistakes in planning described above, among other reasons, only two countries completed the second set of homework, namely Botswana and Zimbabwe. We decided that it was better to continue with a smaller set of countries that had real interest, than a larger group which included some with less commitment.

For the second workshop, we asked the original researchers to bring with them four or five additional people from their country. We asked that these be people with experience in training and materials development, and who would be likely to use the materials. With this changed composition, the second workshop proceeded far more smoothly than the first one.

The job was, however, still not finished. The country participants were again sent back with specific tasks in respect of finding missing information and developing country-appropriate handouts for the different exercises. This process took much longer than expected as participants were dispersed across different organisations and all were again occupied with their ordinary work. The work is finally complete, however, and UNIFEM has undertaken to publish and disseminate the product.

## Violence Against Women

### Violence against women crosses the divides

The WBI has consistently emphasised that gender is not the only axis of disadvantage in either South Africa or any other country. In particular, in South Africa race continues to be an important determinant of an individual's situation and prospects. Further important factors include location (rural and urban, province, etc), class and age. The WBI focused on issues affecting the most disadvantaged, namely those who, in addition to being female, were black, rural and poor.

There is, however, at least one issue that affects women across class, race and other divides. That issue is violence against women. During the process leading up to the 1994 elections which ended apartheid, women united across class, race and political party in the Women's National Coalition. In this process, it became evident that opposition to violence against women could be a unifying factor. Further, statistics suggest that the prevalence of violence against women is higher in South Africa than in many other countries.

The WBI recognised the importance of gender violence in its first set of research reports. In the second year, one of the chapters focused on the budgets of the Departments of Safety and Security (police) and Justice and Correctional Services (prisons). (In South Africa, we use the word 'Department' where most countries would use 'Ministry'.) In each of these departments, the author focused her attention on what policies, programmes and budgets were being directed against gender violence.

### A new act as a focus of advocacy

A few years later, the issue of budgets and gender violence was taken up by another NGO. In 1993, shortly before the elections, the last apartheid government passed a series of laws addressing gender issues. One of these was the domestic violence act. The law was a step forward, but it soon became evident that it had many weaknesses. In 1998, the post-apartheid government introduced a new domestic violence act, which improved on the previous one in a number of important ways.

It was at this stage that civil society activists started asking questions about how effectively the new law would be implemented. In

particular, alerted to the importance of resources by the publicity around the WBI, they asked whether a budget had been allocated for implementation. The Minister of Justice responded by saying that two million rand had been set aside for this purpose. However, when questioned further, he could not say how this money would be used.

Concern at this lack of clarity provoked the Gender Advocacy Programme (GAP) to coordinate an information session for other NGOs in June 1998. At this session, the Community Agency for Social Enquiry (CASE), which was one of the core partners of the WBI, provided input on how the allocation of government funds happens. The exploratory session laid the basis for a further workshop in May 1999. The second workshop, hosted by GAP and facilitated by CASE, explicitly discussed the budgetary implications of the new law. The workshop brought together activists from eight NGOs that assist victims of domestic violence, deal practically with domestic violence issues as part of their daily work or have expertise in looking at budgets. After the workshop, GAP commissioned CASE to conduct research into the planned implementation of the Act and related budgets. The problem areas raised at the workshop were used as a starting point for the research.

The earlier WBI research had already pointed to the fact that a range of government departments perform functions relevant to domestic violence. To keep things manageable, it was agreed that CASE would focus on the Departments of Justice, Safety and Security and Welfare. A further complication is that some of the responsibility for implementation of the law lies with provincial rather than national government. It was agreed that CASE would use the Western Cape province as a case study. This choice would bias the findings to the extent that the Western Cape is in many ways wealthier than other provinces. However, the province had the highest per capita serious crime rate in the country. Further, GAP was based there.

The research revealed that there had, in fact, been some planning in government as to how to spend the two million rand allocation. In particular, much of the money was to be used for training civil servants responsible for the new functions specified in the law. Beyond this specific allocation, there were also other activities and allocations by departments. Nevertheless, the plans and allocations would clearly not be adequate to realise the full potential of the Act.

The concrete output of the project was a report entitled *Making the Act Work* (Goldman, 1999). GAP distributed the publication widely, both within South Africa and beyond. It also organised a dissemination workshop to which it invited national and provincial government officials and NGOs representatives concerned about gender violence. At this workshop, participants discussed the findings and recommendations. Subsequently, the Western Cape Network on Violence Against Women, which brings together NGO and government players, again took up the issue.

### Researching for parliament

In 2000, the parliamentary Committee on Improvement of the Quality of Life and Status of Women (CIQLFW) decided that it would focus its attention on violence against women, alongside poverty and HIV/AIDS, as the most serious problems affecting South African women. As part of this new strategy, the committee commissioned CASE and GETNET to undertake research into the budget aspects of the three foci. The partners, in turn, commissioned the Centre for the Study of Violence and Reconciliation (CSVR) to cover the issue of violence against women. CSVR was not a women's or gender organisation, but had a strong gender unit. This unit had previously undertaken solid research into different aspects of gender violence, and was also involved in service provision and training of civil servants, particularly police. It thus had an excellent understanding of many of the issues which needed to be covered.

From its side, CSVR was keen to take forward research on government spending to combat violence against women. In addition to the parliamentary request, there were two other sources of impetus. The first was a training programme aimed at reducing the secondary victimisation of rape survivors, and the second was a South African Law Commission discussion paper exploring the feasibility of a victims' compensation fund.

### Multi-pronged research and advocacy

#### *Reducing the secondary victimisation of rape survivors*

In 2000 the Gender Unit of CSVR ran a training programme aimed at reducing the secondary victimisation of rape survivors. The trainees were detectives from around the country working within the

government's specialist Family Violence, Child Protection and Sexual Offences (FCS) Units. While developing the training, CSVr saw secondary victimisation as resulting from sexist stereotyping and prejudice towards rape survivors. Their solution to the problem was thus training and information to challenge such attitudes. By the end of the training, however, CSVr had a more complex understanding of the problem. They understood that under-resourcing played a significant role in the inadequate treatment of rape survivors. Indeed, the ill-treatment of women was almost guaranteed when government institutions did not adequately equip their employees with the skills, workplace support and material resources to carry out their duties effectively and compassionately. This led CSVr to the WBI as a way of exploring the gap between policy and implementation.

### *A victims' compensation fund?*

At about the same time as CSVr started planning the research, the Law Commission released a discussion paper, *Sentencing: A Compensation Scheme for Victims of Crime in South Africa* (SA Law Commission, 2001). The report proposed that rape survivors who report their crime and cooperate with the criminal justice system be given an amount of R2,000 in compensation. The idea of compensating women for the violence done to them was an interesting one. Exactly what are the costs associated with victimisation? How does one put a value to suffering?

From these starting points, CSVr chose to focus on three different aspects of government financing of initiatives to combat violence against women:

- ◆ describing and analysing the nature, range and extent of government support for NGOs providing services to women experiencing gender-based violence;
- ◆ assessing national and provincial budgetary allocations towards the development and implementation of policies and legislation; and
- ◆ developing a preliminary analysis of costs of violence against women to the state, society and individuals.

### *The survey*

In June 2001 CSVr sent out a national survey to 196 organisations around the country. Each of these organisations had been identified as

offering some form of service to women aged fifteen years and older who had experienced gender-based violence. Ultimately, 142 organisations (or 72%) responded to the questionnaire. Most of the organisations were willing to provide CSVr with information about their government funding. Their responses allowed CSVr to calculate how much money government departments provided to organisations, as well as which government departments provided the most support. CSVr also learnt how few organisations were tendering for government work in the area of gender violence. They learnt, conversely, how few tenders were put out for this work.

### *From research to workshops*

The research highlighted that the organisations' lack of knowledge about government funding and tendering processes was hampering their ability to secure this funding. As a next step CSVr developed a training programme and participants' manual aimed at increasing organisations' knowledge. The executive summary of the research report was included in the participant pack. The pack also included application forms for various funds, the Department of Social Development's service plan, and tips on tendering and proposal writing. Where possible, CSVr included contact information for the provincial government departments. The organisation invited government representatives to each workshop to explain their service plan. Unfortunately, these representatives were present at only two out of the five workshops.

Participants commented that, while they had participated in a number of research projects, this was the first time researchers had 'returned' information to them and asked for input around the research recommendations.

### *Interviewing government employees*

This proved to be the most challenging component of the study. To assist in gaining access to information, the parliamentary committee provided CSVr at the outset with a letter confirming that it had commissioned the research. Nevertheless, some government employees still ignored telephone calls and repeated requests for information. It was easier to get women to talk about their very painful experiences of being raped, abused or infected with HIV than it was to persuade some government employees to provide information about their budgets, programmes and expenditure. However, those government employees

who did make time were often extremely helpful. They provided figures for their projects, as well as insight into some of the reasons why budgets were not spent or projects were under-resourced.

One serious obstacle in this research was that government departments do not disaggregate their budgets in much detail. Overall totals for training or personnel are provided, but there is no breakdown, for example, of how many clerks around the country are specifically employed to implement the domestic violence act. In an attempt to flesh out some of this detail, CSVr undertook case studies at two courts to illustrate the resources, both human and material, needed to implement the act.

### *The women's study*

Estimating the costs that violence imposes on the women involved is a very difficult endeavour. Most studies attempting to look at the costs of victimisation have used surveys and focused their questions on either the worst incidents of violence, or violence experienced within a particular time frame. CSVr had neither the money nor the time to conduct such a survey. They also felt that this approach would not capture the cumulative experience of repeated abuse.

Instead, CSVr chose to provide a series of case studies illustrating a diverse set of women's experiences over time. This approach illustrated the complexity of violence in women's lives. However, it did not always produce the kind of precise detail that statisticians desire. For example, women who have experienced multiple abuses can not remember the details of each incident after a while. The interviews also highlighted women's under-usage of services. This suggested that violence against women cost the state less than it should, and that women and their families were bearing the burden of the costs.

CSVr deliberately selected women from a variety of life circumstances. In doing so, they were able to show how marginalisation excludes some women more than others from South African society's benefits and leaves them to bear the brunt of the costs of victimisation.

### *Where to from here?*

CSVr's research and follow-up activities began very soon to produce results. The frustration expressed at the workshops around the distribution policies of key government-related funding bodies led in some instances to the formation of cross-provincial task teams. These

teams were to meet with the various boards and government departments – although some participants had no faith in this process and decided to address their complaints to the media.

Further, both the government and organisational survey reports can function as baseline studies against which government's progress can be measured. They also have the potential to support advocacy around future budgets.

It is not clear at this stage to what extent the parliamentary committee will use the research that CSVR conducted for them. However, by raising further funds, expanding the research focus, and building dissemination, organisation and advocacy into its strategies, CSVR avoided the danger of having a solid research effort gather dust on the shelves.

## Province-based Work

South Africa has nine provinces, each of which has its own legislature, executive and budget. National government is responsible for overall policy-making, but provinces bear the main responsibility for delivery of health, education and welfare. They are thus key foci for gender budget work.

KwaZulu-Natal, on the east coast, has the largest population of all the provinces and is also one of the poorest. Gender budget work has advanced quite far in the province, largely due to the work of an NGO, the Provincial Parliamentary Programme (PPP). The PPP, as its name implies, works mainly with the provincial legislature. However, it has drawn in the other gender structures in the province as well. The box gives a brief description of the structures that make up the 'provincial gender machinery' in KwaZulu-Natal. Other provinces have similar, though not identical, structures.

### The Provincial Gender Machinery

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The formal gender structures in KwaZulu-Natal are as follows:

*Legislature:* There are 80 public representatives in the legislature, of whom 21 are women. These women members of the provincial legislature (MPLs) have formed a parliamentary women's caucus (PWC), whose function is to:

- ◆ be a forum in which MPLs discuss gender issues, and agree on a common platform;
- ◆ be a forum for capacity building of women MPLs;
- ◆ provide a central point of access for advocacy by civil society;
- ◆ provide a central point for women MPLs to communicate with women's organisations; and
- ◆ ensure that all legislation put before the legislature is gender-sensitive.

The PWC has lobbied for the creation of a provincial standing committee on women, children, youth and disabled persons, similar to the committee on women in the national parliament. The committee would be responsible for monitoring the performance of government departments and drafting legislation. To date, the committee has not been formally established.

*Provincial executive:* In December 2001 the provincial executive established a provincial Office on the Status of Women (OSW) within the Premier's Office. This body mirrors a similar body in the national President's office. Its task is to coordinate an inter-departmental forum of gender focal points from each of the provincial departments.

*Commission on Gender Equality (CGE):* This is a national body established under South Africa's constitution. Its mandate is to monitor and promote gender equality. The Commission has a provincial office in KwaZulu-Natal.

*Civil society:* There is no single organised gender structure within civil society, but there are many sectoral networks, of varying strength.

## 2001/02 budget period

In early 2001, shortly before the annual budget hearings, the PPP, PWC and provincial office of the Commission on Gender Equality (CGE) established the province's first women's budget initiative. The partners developed a document outlining what a women's budget can achieve, and the legislature's responsibility to support such an initiative. They developed a standard set of questions and asked the legislature's finance portfolio committee to give these questions to all provincial departments for written response during the budget hearings process. The PPP and PWC lobbied the then chairperson of the finance committee and got his support for the initiative. The committee included the proposed questions word-for-word in their set of questions to all departments.

The PPP reported on this achievement to a meeting of the PWC, and urged them to monitor departments' responses during the budget hearings. The PPP suggested that the answers could be used as a baseline for follow-up during the course of the year.

Out of a total of 13 provincial departments, nine included detailed responses to the gender questions. The other departments either reported that they provide equally for men and women and that women are not discriminated against, or that the questions were not relevant to their line function, or they simply ignored the gender questions. Unfortunately, the committee members did not interrogate any of the responses. Further, no-one took the initiative to compile the gender information collected through the hearings and provide this to the PWC, CGE or civil society organisations for follow-up.

### 2002/03 budget period

The partners to the 2001/2002 budget initiative tried again the next year, and brought the newly established provincial office of the OSW on board. The group decided on a new approach. Instead of standard questions, they developed sector-specific questions for each department.

The PWC and PPP had previously approached the new finance portfolio committee chairperson. He said he would cooperate as the committee had done the previous year. However, he later refused to send the sector-specific questions to the departments. He said they were too long and detailed for the hearings, and that the PWC should send them to departments directly.

At first the PWC delayed sending the questions to departments, as they felt this should be done by the new standing committee on women. However, after delays in establishing the committee, the PWC decided that it should submit the questions as parliamentary questions for written reply, and that the other bodies should then monitor what happened.

### Training interventions

In October 2001, the PPP was asked to organise a session on gender budgeting as part of a finance workshop for portfolio committee chairpersons. The session covered:

- ◆ understanding the concept of a women's budget;
- ◆ an overview of the national WBI;
- ◆ gender equality and budget analysis; and
- ◆ introducing gender into the provincial budget process.

The fourth part drew on departmental commitments during the 2001/02 budget process and included a practical exercise. The exercise took participants through the budget process so that they could identify steps that they could take at every stage to raise gender issues.

### Analysis of approach and achievements

The 2001/2 and 2002/3 activities did not achieve as much as the partners had hoped. Many of the reasons were related to weaknesses in structures:

- ◆ Inter-party tensions and lack of focus and capacity within the PWC prevented proper planning and coordinated, united action.
- ◆ An inter-departmental forum was set up in the Premier's Office prior to the establishment of the OSW. This forum was not accessible or accountable to either civil society or the provincial legislature. It was also not in an appropriate position, and did not have the organisational capacity, to monitor departmental budgets itself.
- ◆ The provincial OSW was struggling to establish itself. It had the status of a sub-directorate, and had been allocated inadequate resources for its mandate.
- ◆ The CGE had limited resources. One full-time and one part-time commissioner served both KwaZulu-Natal and another province, and the office had limited management and support staff.
- ◆ There was no organised civil society gender structure to take up issues of gender budgeting.

The 2001/2 approach, in the form of a set of standard questions to departments, was successful in that the finance portfolio committee used their muscle to get responses from departments. But the MPLs did not actively scrutinise departmental budgets during the budget hearings. They also did not monitor the implementation of the budget. The initiative did, however, identify the need for a provincial women's

budget initiative. It also forged strong links between the PWC, CGE and PPP around the issue.

The 2002/3 approach, in seeking more detailed information from departments, alienated the finance portfolio committee. This left the initiative in the hands of the PWC. The alliance was strengthened with the bringing on board of the provincial OSW. It should be further strengthened in the near future by the formation of the joint standing committee.

## Looking at Revenue

Most gender budget initiatives have focused their attention on expenditure rather than revenue. This is understandable and sensible in developing countries, where a large proportion of the resources are external. Nevertheless, revenue is an important issue. In terms of process, when governments draw up budgets, the first step is usually to determine the resource envelope, i.e. to determine levels and sources of revenue. Expenditure must then be planned within this envelope. Further, taxation – and particularly direct taxation – is not the only form of revenue that is open to gender analysis.

The WBI from the start recognised the importance of revenue. The first round of research included a chapter on taxation. The chapter looked at gender and poverty issues in both direct and indirect taxation. The fourth round of research included a chapter on donor funds. This research was based primarily on structured interviews with representatives of the thirty-odd bilateral and multilateral donors who together contributed about 2 per cent of the national budget.

In the fifth year of the initiative, revenue became the centre of attention. Three papers were produced: an update on taxation, an analysis of customs and excise, and an investigation of gender issues in local government revenue.

Customs and excise was a completely new area for the initiative. In tackling the topic, the researcher was able to draw on the work and experience of affected trade unions and, in particular, the Southern African Clothing and Textile Workers Union (SACTWU). She was also able to draw on the international literature on gender and trade. As noted above, the resulting chapter in *Money Matters* was translated into three indigenous languages and distributed to trade unions.

To date, however, the gender aspects of revenue have not really been taken up. From the media it is clear that, for the upper and middle classes, the taxation aspect of revenue is of key interest in every budget. When the budget speech is delivered, there is also great interest in what the Minister of Finance will announce in respect of 'sin' taxes on alcohol and tobacco. Among poorer people and their advocates, however, the focus is still on expenditure. It is thus more difficult to find groups to take the research forward into advocacy.

## Conclusion

This chapter has looked at a range of ways in which South African work in the gender budget field has expanded in terms of focus, approach and players. As noted, the approach is more widespread in South Africa than in many other countries.

Nevertheless, the majority of South Africans would still be perplexed if they heard the term 'gender budget'. Further, at this stage there is very little activity inside government. In the late 1990s the national Department of Finance had a gender budget initiative for two years as part of the broader Commonwealth Secretariat pilot initiative. In those years the standard publications tabled on budget day included discussion of gender issues. About two years ago, one of the provinces instituted a gender budget initiative. Top officials of each of the eight provincial departments were trained and produced detailed gender budget statements. At the last moment, however, the person responsible for producing the budget documents omitted these pieces.

When asked recently about the disappearance of gender budget work within government, a top official in the Treasury responded that they were "doing it". Correctly, he saw the gender budget as focusing on how government was addressing the needs and interests of disadvantaged people, including women. What he failed to see, however, was the need to disaggregate disadvantage, so as to understand the ways in which needs and interests differ. What he also failed to see was the need for government to be transparent in the way it reports what it is doing. In particular, the government's move towards a programme approach in budgeting requires it to develop targets and indicators of delivery alongside figures saying how many rands it has allocated and spent. To date, however, the targets and indicators are poorly developed in general terms, let alone in terms of gender disaggregation.

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