

SOUTH
AFRICA

Gender budgeting

South Africa was one of the first countries to introduce a gender perspective in its economic policy-making. Created in mid-1995, approximately one year after the country's first democratic elections, the South African Women's Budget Initiative was the result of a joint effort of parliamentarians and several civil society organisations. Within a few years, the Women's Budget Initiative had analysed all sectoral allocations of the government's budget from a gender perspective and had inspired a parallel government exercise conducted in the Department of Finance.¹

The Women's Budget Initiative did not propose to create a separate budget for women, but rather examined the whole of the government budget to determine its differential impacts on women, men, girls, and boys. The idea behind the budget exercise was to analyse all forms of public expenditure or methods of raising revenue in the context of the benefits that would accrue to women and girls in relation to men and boys. The first phase of the initiative focused on four sectors—welfare, education, housing, and the Reconstruction and Development Program—and on the cross-cutting themes of taxation and public sector employment. The second phase, launched in early 1997, included areas such as health, justice, safety and security, correctional services, transport, home and foreign affairs, agriculture, land affairs and energy.

Under the Women's Budget Initiative, public expenditures were analysed in three categories:

- Amounts allocated to women-specific projects, to determine the level of gender-specific expenditures
- Amounts allocated to affirmative action and other policy initiatives in government employment that promote the development of female staff members
- Amounts allocated to all other policies and programs of government, and the effect of these expenditures on women relative to men in the aggregate and on different groups of women.

The Women's Budget Initiative was conducted in a participative way, so as to involve discussions at the national and local levels of government and to seek input from citizens. It was supported by a number of international foundations and development agencies.²

One of the keys to the success of the Women's Budget Initiative was the alliance between some of the parliamentarians that had entered parliament for the first time in 1994 and civil society organisations. Civil society organisations were able to provide the expertise and time necessary to collect information, undertake the research and produce the analysis, while parliamentarians provided access to information and framed the whole initiative in terms of a key political issue. Researchers were drawn from a range of different non-governmental organisations (NGOs) and academic institutions and were supported by a reference group composed of parliamentarians and government officials. All were chosen according to their expertise on gender issues or on a particular sector, rather than on budgeting. Civil society agencies and women's groups at the local level were also invited to participate in project activities through collaborative workshops with organisations such as the Gender Education and Training Network and the United Nations Development Fund for Women. As a follow-up to these workshops, a simplified version of the workshop findings was published for the general public and particularly for women's groups.

1 Debbie Buddlender, *The Women's Budget* (Cape Town and Pretoria: Institute for Democracy in South Africa, 1996); Debbie Buddlender, *The Second Women's Budget* (Cape Town and Pretoria: Institute for Democracy in South Africa, 1997); Debbie Buddlender, *The Third Women's Budget* (Cape Town and Pretoria: Institute for Democracy in South Africa, 1998).

2 Winnie Byanyima, "Politics, Good Governance and Gender," in *Engendering Development* (Washington D.C.: World Bank Policy Research Report, 2001), 270; Joachim Weiner and Winnie Byanyima, *Parliament, the Budget and Gender* (Geneva, New York and Washington D.C.: IPU, UNDP, World Bank Institute and UNIFEM, 2004), 28.

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Key lessons learned from the South African Women's Budget Initiative include:

- The Initiative drew strength from being located both inside and outside government and from the collaboration between parliamentarians and NGOs. The combination of effective research and powerful lobbying within parliament was fundamental and allowed the Initiative to take roots and produce valuable results.
- Gender budget analysis is best learned through practical engagement. In this sense, gender budget training can help specialists to apply their general knowledge about gender in concrete budget-related contexts.
- Interest and pressure from outside the government is vital for ensuring the success of gender budgeting initiatives. The involvement of civil society and the publication of resources explaining gender budgeting issues in simple words to a non-expert audience proved crucial to ensuring the widest possible reach of the Women's Budget Initiative.