women
Department: Women
REPUBLIC OF SOUTH AFRICA

(DRAFT)
GENDER RESPONSIVE PLANNING & BUDGETING FRAMEWORK
**Acronyms:**

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Definition</th>
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<tbody>
<tr>
<td>B-BBEE Act</td>
<td>Broad-Based Black Economic Empowerment Act</td>
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<tr>
<td>CASE</td>
<td>Community Agency for Social Enquiry</td>
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<tr>
<td>DPME</td>
<td>Department of Planning, Monitoring and Evaluation</td>
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<td>DOW</td>
<td>Department of Women</td>
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<tr>
<td>FFC</td>
<td>Financial and Fiscal Commission</td>
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<tr>
<td>GRP&amp;B</td>
<td>Gender Responsive Planning &amp; Budgeting</td>
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<tr>
<td>IDASA</td>
<td>Institute for Democratic Alternatives</td>
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<td>IDPs</td>
<td>Integrated Development Plans</td>
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<tr>
<td>JCPS</td>
<td>Justice, Crime Prevention and Security</td>
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<td>MFMA</td>
<td>Municipal Finance Management Act</td>
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<td>NT</td>
<td>National Treasury</td>
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<td>NGO's</td>
<td>Non-Governmental Organisations</td>
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<td>PPPFA</td>
<td>Preferential Procurement Policy Framework Act</td>
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<tr>
<td>SADC</td>
<td>Southern African Development Community</td>
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<td>Stats SA</td>
<td>Statistics South Africa</td>
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<tr>
<td>SoE</td>
<td>State Owned Enterprise</td>
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<td>UN</td>
<td>United Nations</td>
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<td>WBI</td>
<td>Women's Budget Initiative</td>
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GENDER RESPONSIVE PLANNING & BUDGETING FRAMEWORK

1. Purpose

To ensure a Gender Responsive Planning and Budgeting Framework that provides a standard approach towards strengthening the mainstreaming of gender perspectives into policy, planning and budgeting processes by contributing to the achievement of gender equality and the empowerment of women, youth and girls.

2. Problem Statement

2.1 The core to women’s inequality is the patriarchal social ideology that places them in a subordinated position in relation to men. An important practical manifestation of the patriarchal social ideology is women’s limited access to economic empowerment. In turn one of the reasons for the limited access to economic empowerment is patriarchal systems still entrapped in government officials including women’s lack of equal access to development i.e. education and skills. Therefore, any strategy needs to give disproportionate attention to these two aspects. However, these issues cannot be addressed in the absence of an effective and comprehensive policy framework, strategies and Programme of Action that are equally implementable.

2.2 Lack of gender mainstreaming and women empowerment as an approach has resulted in a perpetuation of gender inequality while equity has been more about numbers rather than transformation through mainstreaming as a mechanism towards gender equality.

2.3 There has been fairly weak translation of Gender Equality Commitments into fiscal commitments given that strategies of departments show little evidence of the manner in which strategic planning processes and budget offices have budgeted for gender mainstreaming. This has been compounded by lack of gender budgeting training and Capacity building of decision makers as well as implementing officials.

2.4 There has also been poor translation of the national agenda on women empowerment and gender equality into mainstreamed government and civil society programs. The gender discourse has been mainly event driven where Women’s Month and the 16 Days of No Violence against Women and Children’s Campaign have been budgeted for with limited institutionalisation of initiatives throughout the year. The widespread of gender-based violence and particularly violence against women and girls is also an issue that needs addressed if gender equality is to be realised in the SA.

2.5 The critical intersection of Gender Based Violence and women’s economic empowerment has to be considered. Government is not the only actor in this area but does have an important role to play.

2.6 Obtaining baseline information to allow for progress and impact of interventions to be measured has been inadequate. Gender equality indicators and the collection of gender disaggregated information are limited and sex disaggregated data across sectors remains a challenge.
2.7 Because of the poor institutionalisation of gender responsive budgeting, it has become necessary to ensure the development of a national Gender Responsive Planning & Budgeting Framework to guide government and the private sector on the implementation and institutionalisation of the GRP&B principles.

Some of the key primary causes are tabled below:

<table>
<thead>
<tr>
<th>Problem</th>
<th>Root Causes</th>
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<tbody>
<tr>
<td>The perpetuation of gender inequality within Government Departments, State Owned Enterprises (SOEs) and in the Private Sector.</td>
<td>- Lack of disaggregated data to assist in the process of reviewing and analysing entire planning and budgeting process</td>
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<tr>
<td></td>
<td>- Lack of adequate formulation, allocation and expenditure of budgets, which results in the exclusion of women in planning and budgeting processes that potentially have developmental opportunities for women</td>
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<td></td>
<td>- Ineffective incorporation or lack of gender aware indicators to inform the relevant inputs, outputs and outcomes of plans and budgets (i.e. having equity as an explicit indicator of performance)</td>
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<td></td>
<td>- No integrated meaning of gender and its role within the development objectives of the country and its economy, so that gender mainstreaming can be delivered efficiently and effectively</td>
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<tr>
<td></td>
<td>- Existing departmental initiatives are not coherently aimed at ensuring that all plans policies and programmes are directed and delivered as a government-wide budgeting framework</td>
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<td></td>
<td>- National Treasury needs to be enabled to prescribe a set of minimum standards for government departments so that they are able to be tracked and observed in a gender equitable manner which considers the unique needs and priorities of women and men, girls and boys</td>
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<td></td>
<td>- The Monitoring and Evaluation of gender impacts on expenditure and revenue policies has not been put in place</td>
</tr>
<tr>
<td>Groups that will benefit</td>
<td>How they will benefit?</td>
</tr>
<tr>
<td>-------------------------</td>
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</tr>
<tr>
<td>Women, Youth and Girls</td>
<td>• Improved access to government plans and budgets through applying adequate formulations, allocations and expenditure of budgets</td>
</tr>
</tbody>
</table>
| Women and Youth         | • Improved transformational outcomes in both government and the private sector by means of greater access to policies plans and programmes.  
                          • Greater impact with regards to accessing developmental opportunities, jobs, wages and salaries by means of targeted gender aware indicators that inform the relevant inputs, outputs and outcomes of plans and budgets  
                          • Improved evidence based interventions through the use of disaggregated data to assist in the process of reviewing and analysing entire planning and budgeting process |
| Government Sector       | • State Owned Entities and government departments will improve their role in providing tailored policies and programmes to improve the socio-economic status of women within the mainstream economy  
                          • Existing and future departmental initiatives will have a coherent approach to policies and programmes aimed at ensuring that the transformation and socio-economic empowerment of women is directed and delivered as a government-wide budgeting framework  
                          • The Monitoring and Evaluation of gender impacts on expenditure and revenue policies will be more effectively analysed  
                          • National Treasury will be enabled to put in place a prescribed set of minimum standards for government departments to adhere to |
- An integrated meaning of gender and its role within the development objectives of the country and its economy for a more effective and efficient implementation of gender mainstreaming

**Private Sector**

- A clear and integrated meaning of gender and its role within the development objectives of the country as well as the economy
- Industries will have an adequate formulation for allocating relevant expenditure budgets towards transforming their sector and reduce if not eliminate barriers that cause or create an environment of exclusion for women within their planning and budgeting processes and subsequently creating more effective developmental opportunities for women.

<table>
<thead>
<tr>
<th>Groups that will bear the costs</th>
<th>How will they incur costs?</th>
</tr>
</thead>
</table>
| Government Sector               | - Will need to improve on all policies and programmes aimed at empowering women, youth and girls
|                                 | - They will also incur the costs of implementing these policies and programmes
|                                 | - Putting in place the necessary legislative environment |
| Private Sector                  | - Skilling their workforce and raising awareness within their sector in relation to Gender Responsive Planning and Budgeting in line with the integrated meaning of gender and its role within the development objectives of the country as well as the economy
|                                 | - Improving on all current and future policies and programmes aimed at the socio-economic empowerment of women within |
the mainstream economy
- Aligning their work to the formulation of allocating relevant expenditure budgets towards transforming their sector and reducing if not eliminating all barriers related thereto
- Adhering to any legislative changes that may be introduced

<table>
<thead>
<tr>
<th>Groups inside and outside government whose behaviour will have to change</th>
<th>Behaviour that must change</th>
<th>Main mechanisms to achieve this</th>
</tr>
</thead>
</table>
| Government Sector | Inadequate awareness for the need to have gender sensitive and responsive plans and budgets. | • Awareness campaigns  
• National framework to guide all sectors  
• Negotiation buy-in from government  
• Potential legislative amendments |
| Private Sector | Inadequate awareness for the need to have gender sensitive and responsive plans and budgets. | • Awareness campaigns  
• National framework to guide all sectors  
• Negotiating buy-in from private sector  
• Potential alignment to legislative amendments |

3. Objectives of the framework

The Gender Responsive Planning & Budgeting Framework is intended to provide a comprehensive instrument for strengthening the mainstreaming of gender perspectives within the planning and budgeting processes of in the main government and further encourage the private sector to also contribute to gender equality and the empowerment of women and girls.
The following objectives are key to attaining an effective Gender Responsive Planning & Budgeting Framework:

- Put in place clear gender responsive indicators that strengthen institutional capacity towards implementing effective planning and budgeting processes.
- Strengthening existing outputs and outcomes of gender frameworks with equity as an explicit indicator of performance.
- Integrating gender perspectives that improve on the existing meaning of a developmental socio-economic state, by improving its resource allocation towards efficiently and effectively empowering all forms of gender.
- Provide a disaggregated, standardized format for gender responsive planning and budgeting for all government departments, state owned enterprises and municipalities to align their work to and report on.

4. Introduction

4.1 The Women's Budget Initiative was initiated by the Parliament of South Africa and was subsequently taken over by the Joint Monitoring Committee on Improvement of Quality of Life and Status of Women.

4.2 Following democratic elections in 1994, the Parliament of South Africa initiated the Women's Budget Initiative (WBI) with the intention of reorienting the National Budget post-apartheid. It aimed to give cognisance to multiple factors such as gender, single parents, and the informal and rural sectors among others. It was believed that real change could only be effected if the process of change was supported and backed by adequate resources. In order to gauge availability of resources and compile a more gendered budget, in 1995, the Finance Committee along with partners such as Institute for Democratic Alternatives (IDASA) set about analysing the existing national budget in terms of how resources were collected and spent.

4.3 The Women's Budget Initiative (WBI) was established in mid-1995 and involved the Institute for Democratic Alternatives (IDASA) and the Community Agency for Social Enquiry (CASE), as well as Parliamentarians. The strategy was that two NGO's and their partners would provide parliamentarians with evidence that they could use from their position of power in parliament to advance gender equality and women empowerment.

4.4 South Africa was the first nation to join the pilot project on gender budget analysis initiated by the Commonwealth Secretariat. The Women's Budget Initiative was launched with the collaborative efforts of parliamentarians (the Joint Standing Committee on Finance) and two nongovernmental organizations (NGOs) - the Institute for Democracy in South Africa (IDASA) and the Community Agency for Social Enquiry (CASE). In 1996, the Committee on the Status and Quality of Life of Women replaced the Joint Committee of Finance and became the official partner of Women's Budget Initiative (WBI). In addition, researchers were selected from various nongovernmental organizations (NGOs) and academic
institutions. This team of researchers was, in turn, supported by a reference group consisting of selected parliamentarians, government officials, and members of NGOs.

4.5 From 1996 to 2000, a "women's budget" was prepared annually. The idea behind the budget exercise was to analyse any form of public expenditure or method 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 (RDP) - as well as on the cross-cutting themes of taxation and public sector employment.

4.6 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 initiative, public expenditures were analysed in three categories, namely:

- Amounts allocated to women-specific projects to determine the level of gender specific expenditures;
- Affirmative action and other policy initiatives in government employment, which promote the development of female staff members; and
- Funds 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.

4.7 The Women's Budget Initiative (WBI) analysed the impact of government budgets on women and men, girls and boys, and different groups of these. The analysis involved five steps:

- Describing the situation of women and men, girls and boys in a particular sector;
- Deciding if policy matches that situation: examine the policy and programmes of government, and see if they address the gender gaps in the situation described in step one;
- Assessing whether government has allocated sufficient money and people to implement the gender-sensitive policy and programmes;
- Monitor the outputs and delivery of budgets. Has the money been spent as planned? How many men, women, boys and girls has it reached, and in what areas; and
- Assessing outcomes: have the policy, programmes and expenditure helped to address the gender gaps? Have they helped to change the situation described in step one so that it is more equitable?

4.8 In the first three years, the initiative looked at the budgets of all national - and to a lesser extent provincial - departments. In the fourth year, the Women's Budget Initiative (WBI) looked, among other things, at the budgets of five municipalities. The initiative published three studies that examined all 27 portfolios in the national budget. The books also included information on public sector employment, taxation and economic theory. Later analysis looked at donor funding to government, local government budgets, the impact of sectoral budgets and employment creation, non-tax revenue and a range of other issues.
4.9 The Women’s Budget Initiative (WBI) did not argue for a separate budget for women. It is not, for example, interested only in how much money is allocated for the Office on the Status of Women or the Commission on Gender Equality, although these are important questions. Instead, the Women’s Budget Initiative says that we must ensure that the whole budget - all 100% of it - is spent in a way that promotes equity for women and men, girls and boys, and different sub-groups.

4.10 The Women’s Budget Initiative also did not look at budget numbers in isolation. Budgets reflect policy, so to analyse them we must start much earlier than the numbers, just as budget planners now do. The Women’s Budget Initiative was interested in race, poverty and geography as well as gender. All these things together determine a person’s opportunities, roles and needs. They believed that gender was a good way to focus on race, poverty and geography because there were more black women than black men, more poor women than poor men, and more rural women than rural men.

5. Legal and Policy Frameworks

5.1 South Africa’s National Policy Framework for Women Empowerment and Gender Equality

The following indicators are listed for Transformation in the Allocation of Resources:

i. The level of human and financial resources allocated to programmes to advance women’s empowerment and gender equality;

ii. Specifically identified, gender-based expenditure by national and provincial departments (for example, on women’s health programmes or special education programmes for girls);

iii. Equal employment opportunity expenditure by such departments on their employees (for example, the training for women managers, and job descriptions which reflect equal employment opportunities);

iv. Gender mainstreaming of budget allocations and expenditures (for example, allocations to support rural women agriculturists).

5.2 Convention on the Elimination of All Forms of Discrimination Against women (CEDAW)

5.2.1 CEDAW requires that the raising and spending of public money be non-discriminatory and consistent with substantive equality between women and men, as autonomous possessors of rights. This implies that a gender perspective on budgets should be primarily concerned with the direct benefits from, and contributions to, government budgets that women and men get as persons in their own right. For instance, women do tend to benefit indirectly from health and education services that go to their sons, husbands and fathers; but that does not justify a smaller share of public expenditure on health services going directly to women than directly to men.

5.2.2 However, equality does not necessarily imply identical treatment of men and women. Instead, CEDAW recognizes that non-identical treatment is necessary under certain circumstances to address
the biological and socially constructed differences between men and women (CEDAW, General Recommendation 25, para. 8).

5.2.3 CEDAW not only requires governments to assess how women compare with men, as beneficiaries of and contributors to government budgets. It also clearly sets out three State obligations that must be central in efforts to eliminate discrimination against women in government budgets (CEDAW, General Recommendations 25, para. 6).

These obligations are to ensure:

- Relevant laws and policies do not discriminate (directly or indirectly) against women in either form or effect and to provide protection against discrimination;
- Improvement of women's de facto (or substantive) equality; and
- Programmes of which women are beneficiaries and the revenue systems to which they contribute, transform relations and stereotypes that inhibit women’s enjoyment of substantive equality.

5.2.4 Other key obligations include the requirement that the government secure women’s participation as active citizens in decisions about budgets and their ability to hold governments to account for the way in which public money is raised and spent.

5.3 Beijing Platform for Action

The Fourth World Conference on Women held in Beijing in September 1995 focused on the Commonwealth’s endeavour to incorporate gender issues in the macroeconomic planning and policy making of its members. South Africa, one of the participating member countries, committed to bring about gender equity in the country by addressing the critical issues outlined in the declaration made at the conference—the “Beijing Platform of Action.” In 1984 a gender-responsive budget analysis had been pioneered in.

Key points are listed and summarised below.

5.3.1 A. Women and poverty

Strategic objective A1: Review, adopt and maintain macroeconomic policies and development strategies that address the needs and efforts of women in poverty.

Actions to be taken by governments: Restructure and target the allocation of public expenditures to promote women’s economic opportunities and equal access to productive resources and to address the basic social, educational and health needs of women, particularly those living in poverty.

5.3.2 F. Women and the economy
Strategic objective F1: Promote women's economic rights and independence, including access to employment, appropriate working conditions and control over economic resources.

Actions to be taken by governments: Facilitate, at appropriate levels, more open and transparent budget processes

5.3.2.1 Financial arrangements

Full and effective implementation of the Platform for Action, including the relevant commitments made at previous United Nations summits and conferences, will require a political commitment to make available human and financial resources for the empowerment of women. This will require the integration of a gender perspective in budgetary decisions on policies and programmes, as well as the adequate financing of specific programmes for securing equality between women and men. To implement the Platform for Action, funding will need to be identified and mobilized from all sources and across all sectors. The reformulation of policies and reallocation of resources may be needed within and among programmes, but some policy changes may not necessarily have financial implications. Mobilization of additional resources, both public and private, including resources from innovative sources of funding, may also be necessary.

5.3.2.2 National level

The primary responsibility for implementing the strategic objectives of the Platform for Action rests with governments. To achieve these objectives, governments should make efforts to systematically review how women benefit from public sector expenditures; adjust budgets to ensure equality of access to public sector expenditures, both for enhancing productive capacity and for meeting social needs; and achieve the gender-related commitments made in other United Nations summits and conferences.

To develop successful national implementation strategies for the Platform for Action, governments should allocate sufficient resources, including resources for undertaking gender-impact analysis.

Governments should also encourage non-governmental organizations and private sector and other institutions to mobilize additional resources.

5.4 International Covenant on Economic, Social and Cultural Rights

5.4.1 Already in 1955, one year before the adoption of the final Constitution, the South African government signed the International Covenant on Economic, Social and Cultural Rights of 1966 (ICESCR).

5.4.2 This signalled a recognition by the first democratic government that all human rights are equal and inalienable, and that importantly “the ideal of free human beings enjoying freedom from fear and want can only be achieved if conditions are created whereby everyone may enjoy [his or her] economic, social and cultural rights, as well as [his or her] civil and political rights”.

5.4.3 Twenty years later South Africa ratified the ICESCR, providing further impetus to the Constitutional obligation to progressively realise socio-economic rights to the maximum of its available resources.

5.4.4 The ICESCR imposes an obligation on governments to move as expeditiously and effectively as possible towards that goal. However, despite these provisions, claims are frequently made by government that it does not have the resources to meet its domestic and international SER legal obligations. Understanding how State budgets operate and how the government prioritises the budget to meet its constitutional SER obligations has become necessary.

5.5 Obligations on the State

Based on the above legal mandate, the following commitments shall be undertaken by government:

5.5.1 Commitment to support gender mainstreaming mechanisms:

The government shall support gender mainstreaming mechanisms for all sectors including private sector where appropriate.

Strategies:

- Promote and facilitate gender analysis, assessment and auditing and gender responsive planning in all relevant sectors and levels
- Provide generic and sector specific gender training and sensitization to government, civil society and private sector to ensure a thorough understanding of gender concepts, gender responsive analysis, planning, budgeting, monitoring and evaluation, and to build understanding of linkages between gender and other cross-cutting issues such as race and class
- Strengthen communication and information capacity in gender sensitisation, advocacy and lobbying
- Mainstream gender indicators in the performance appraisal system to ensure promotion of gender equality and equity at the individual and organisational level
- Incorporate gender awareness as a criterion for recruitment and career development
- Engage private sector structures in gender mainstreaming

5.5.2 Commitment to effective monitoring and evaluation:

The Government shall build capacity in gender responsive monitoring and evaluation to ensure accurate measurement of progress made towards achieving of gender related targets.

Strategies:
- Department of Women shall be responsible for developing a Monitoring and Evaluation Framework with a time bound plan for reporting on implementation. The department shall use the plan for co-ordination of reporting on implementation by various government departments and agencies on the national GRP&B to take into consideration different levels (input, process, impact etc.) indicators of gender equality in line with national, regional and international indicators for which government should provide periodic reports.
- Strengthen national and sectoral capacity in the production of reliable and gender statistics to feed into monitoring, evaluation, advocacy and lobbying efforts.
- Enhance national capacity to fulfil reporting obligations under signatory gender related treaties.

5.5.3 Commitment to Gender Responsive Planning & Budgeting:

The Government shall develop national budgets that are gender responsive through strengthening its Gender Responsive Budgeting & Planning techniques as part of costing, budgeting and resource allocation systems.

Strategies:

- Build national capacity through National School of Government into Gender Responsive Planning and Budgeting at macro and micro levels, including planning, tracking, monitoring and evaluation.
- Secure adequate financial and human resources from National Treasury and development partners, for the full implementation of the national Gender Responsive Planning & Budgeting framework and gender programmes identified by each Department, SoE or Municipality.
- Promote the development of Gender Responsive Planning and Budgeting Guidelines and implementation plans for all public and private sector organisations.
- Department of Women will assist national government departments, agencies and other focal points where needed, to develop their own Gender Responsive Planning and Budgeting plans based upon national priorities using national Gender Responsive Planning and Budgeting Framework as a point of reference.

6. Situational Analysis

6.1 SA views GRB as an instrument or a strategy that can be used for achieving institutional transformation to eliminate the structural inequality of gender, more acutely between women and men, which is a key contributing factor to any developmental state.

6.2 The approach is premised on mainstreaming gender into all socio-economic strategies and plans. GRB starts from a point of view that says that the current budgets are gender biased in favour of men. This approach sets out to transform this sad reality by ensuring that gender, with a specific focus on women and men, benefit equitably as a result of gender responsive budgeting.

In this way Gender Responsive Planning & Budgeting is broadly defined as:
- The allocation of financial resources in a manner that is equally responsive to the needs and interests of women and men.
- A mechanism which ensures that each gender benefits equitably from services delivered through the use of State resources.
- Where the outcome is of a gender balanced distribution of resources and benefits.

6.3 In this way gender is mainstreamed by identifying the gender patterns in society and aligning policies and expenditure such that they can address prevailing gender-based inequalities. In South Africa there have been numerous efforts to implement Gender Responsive Budgeting (GRB) since the first democratic elections in 1994. However, gender responsive budgeting was never integrated in central budgeting process, so there are no evidential experiences and successes that the country can build on.

6.4 The Southern African Development Community (SADC) Gender Responsive Budgeting guidelines therefore come in handy in the quest to develop a South African Framework.

6.5 There are a number of policies that provide guidance from the Constitution that guarantees equal enjoyment by all for all the rights and freedoms (i.e. PPPFMA, MFA, B-BBEE Act etc.). In the democratic South African budgeting system, there has always been a concerted attempt to ensure gender redress by financing government programmes across all departments which focus on issues specific to women and on gender empowerment.

6.6 Gender Responsive Budgeting is broader than a mere tallying of expenditure on women and girls in country budgets. Currently it is a widely acknowledged fact that if Gender Equality has to be achieved, Gender Responsive Planning & Budgeting has to be embedded into the planning cycle of the country’s budgeting process and systems. Much early work on an engendered budget in the 1990s was done in South Africa by civil society organisations and supported by the Joint Budget Committee in Parliament, including the Women’s Budget Initiative. As mentioned, this work was never integrated in the central budgeting process except for budgeting of specific departments where there was provision made for the needs of Women. There is a need for a much wider and integrated approach.

6.7 Over time, many countries have used various gender responsive budgeting tools, often linked to donor financing thereof. In many countries, these have been abandoned as they were not being well-implemented and have not attained the desired outcomes. However, it is encouraging that within other country’s gender responsive budgeting continues to be practiced.

7. Consultations

7.1 The consultations undertaken were done with identified key stakeholders, they were viewed as those who would be both directly or indirectly affected and seen to be potentially key contributors to the objectives of the framework.

Table of Consultations:
<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Key Comments</th>
<th>Support or Disapprove</th>
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<tbody>
<tr>
<td>National Treasury - At the level of Technical Working Group</td>
<td>• Custodians and drivers of compliance in government finance processes</td>
<td>• Support</td>
</tr>
<tr>
<td>Department of Planning Monitoring and Evaluations (DPME) - At the level of Technical Working Group</td>
<td>• Anchor of M&amp;E and compilers of the Budget Mandate Paper</td>
<td>• Support</td>
</tr>
<tr>
<td>Statistics South Africa (Stats SA) - At the level of Technical Working Group</td>
<td>• Data providers and collators</td>
<td>• Support</td>
</tr>
<tr>
<td>Department of Justice and Constitutional Development (DOJ/CJD) - At the level of Technical Working Group</td>
<td>• As the custodian of administering an efficient and responsive justice system which is in line with ensuring any legal gaps and/or opportunities are remedied, as well as a government Department which had previously undergone a process to implement GRB</td>
<td>• Support</td>
</tr>
<tr>
<td>Department of Public Service and Administration (DPSA) - At the level of Technical Working Group</td>
<td>• Drivers of compliance for government-wide institutional arrangements</td>
<td>• Support</td>
</tr>
<tr>
<td>National School of Governance (NSG)</td>
<td>• Capacity building for government officials</td>
<td>• Support</td>
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8. Core considerations when looking into the gender dimension

**Dimensions to consider when looking at budgets from a gender perspective:**

- Women as beneficiaries of publicly funded services may have different needs and priorities to men due to their different social roles and responsibilities. Are they taken into consideration equally?
- Governments transfer money to households in the form of pensions, social security payments, grants and relief payments after natural disasters etc. Do women have the same entitlements to these payments as men?
- Women and men have different time-use patterns. It is a well-established fact that women spend more hours than men doing unpaid work, while men conversely spend more hours doing paid work. In total, women work longer hours per week than men. Budget allocations may increase or decrease the workload of either gender.
- Women’s priorities will only be taken into account if they are sufficiently represented in budget decision making positions.

- To reduce gender inequalities that leave women in less favourable situations, targeted women-specific policies have to be implemented in addition to general gender mainstreaming, until a high-level playing field has been established. These policies must be conducive to empowering women and girls alongside men and boys and overcoming gender stereotypes. Sufficient funds should be allocated accordingly.

- In most countries, a large part of expenditures is spent on public employment. Are women employed as civil servants to the same extent as men and at the same grades, thus benefitting equally from public expenditure?

8.1 Integrating Gender into South Africa’s Budgeting Cycle

The GRP&B Framework development is going to be a process of continuous learning and not an event as lessons learnt and good practice models have to be shared and repeated year in and year out. The planning process will inform resource allocation which will enable effective implementation of programmes that can be better assessed and monitored to inform further planning and consistent improvement. South Africa’s budgeting cycle follows a strict time-bound budgeting process with particular deadlines to be adhered to by Departments, SOEs and Municipalities.

**Figure 1: Budgeting Cycle**

![Budgeting Cycle Diagram](image)

**Figure 2: Gender Responsive Planning & Budgeting Elements**

The GRP&B format is aligned to the national planning and budgeting process within the MTEF and has the following elements:
9. Strategic Focus Areas

Activities for GRP&B should be identified on the basis of evidence resulting from a gender analysis of the situation, policies or budgets of different votes. Below is a tentative list of issues that sectors could take on to commence the exercise of GRP&B. Sectors should select and refine these on the basis of evidence derived from a gender analysis of areas that relate to their respective mandates.

1. Women’s economic empowerment
2. Gender responsive procurement
3. Gender Based Violence
4. Country-wide gender Assessments
5. Sector or Departments specific gender assessment
6. Gender equality in the public administration/ service/ work place
7. Gender equality in leadership and decision making
8. Educational curriculum reform for gender inclusion
9. Maternal health and mortality
10. Boy and girl child health and mortality
11. Policy reviews and revisions for gender inclusion
12. Gender Capacity development including GRB skilling and training in gender planning
13. Review of employment structures to provide for gender units and/or strengthening of focal points
14. Implementation of the coordination mechanism for the multi-sectoral implementation of the national gender policy at national and regional levels
15. Review, reform or formation of relevant legislations including gender issues in justice system
16. Property rights, inheritance and marriage systems
17. Transformation of gender relations in the domestic and household arena
18. Review of the Macro-Economic Framework and System of National Accounting for gender sensitivity
19. Time use studies for women and men
20. Support to the development of advanced gender skills and training for South African men/boys and women/girls
21. Feminised poverty and unemployment
22. Child Care, maternity and paternity issues
23. Strengthening gender aspects in the country monitoring, evaluation and accountability systems including developing GRB monitoring and evaluation systems

10. Scope of Stakeholder Engagement

10.1 Gender Responsive Planning & Budgeting related activities continue in South Africa, although the intensity and scope of activities have diminished over time. South Africa has had two Gender Responsive Budgeting initiatives - one led by National Treasury (Ministry of Finance), a government initiative, and the other led by non-governmental organisations (NGO’s) and Parliamentarians (Women’s Budget Initiative).

10.2 Numerous studies, both in SA and internationally, have concluded that top managers’ commitment is critical if the process of gender mainstreaming is to be successful and sustainable. It is therefore necessary to raise awareness among decision-makers that gender matters in terms of policies and budgeting, and that there are clear implementation guidelines developed in this regard with continued engagement of the following key stakeholders:

10.2.1 The Finance Ministry

In line with gender mainstreaming approach, Gender Responsive Planning & Budgeting should be initiated by or strongly involve the Ministry of Finance. Research done by Southern African Development Community found that this Ministry is central as it is in the position to make decisions in the budget planning process and has the political influence to mobilise support for Gender Responsive Planning & Budgeting initiatives.

10.2.2 The Ministry in the Presidency responsible for Women

In most countries, this Ministry has a mandate for mainstreaming of gender in all policies, projects and programmes of government. In Gender Responsive Planning & Budgeting matters, it is important that the Ministry responsible for Gender works closely with the Ministry for Finance and provides technical guidance support on Gender Responsive Planning & Budgeting initiatives within the Ministry of Finance and other sectors. Learning exchange visits to countries that are implementing Gender Responsive Planning & Budgeting is also crucial to acquire skills and expertise in the Gender Responsive Planning & Budgeting implementation process.

10.2.3 All Spheres of Government (Sectors and Local Government)
The success of Gender Responsive Planning & Budgeting activities significantly depends on the extent to which they have mainstreamed gender and allocated adequate finances to ensure that women and men benefit equitably from the services or infrastructure that is provided by respective ministries and local government.

10.2.4 Civil Society Organisations

Collaboration between government and civil society in Gender Responsive Planning & Budgeting initiatives is likely to be smooth and efficient if there is mutual understanding and concern on the need for advancing gender equality between government and civil society. In South Africa initiatives such as Women Budget Initiative experiences were more successful when groups outside of government were involved as a strong pressure group.

10.2.5 Researchers

Researchers can be used to prepare pre-budget scenarios and carry out post budget impact analysis by applying different tools of gender responsive budgeting.

10.2.6 Statisticians

Statisticians are key collectors good gender budget data and gender responsive planning and budgeting are dependent on the availability of reliable sex-disaggregated data and other gender relevant statistics.

10.2.7 Parliamentarians

Parliamentarians carry the responsibility of approving the budget after it is tabled in parliament. Working jointly with NGOs as part of the Women Budget Initiative in SA, since 1995 has analysed and published various portfolios of the national budget, as well as tracking the impact of sectoral budgets on a range of issues including employment creation.

11. Concluding observations with regards to the Coordination and the Task of Implementing a National Gender Responsive Planning & Budgeting Framework

11.1 Women face unique challenges in the South African economy, even with the current programmes and policies in Government, women remain marginalised, unable to participate meaningfully and this has kept their efforts inadequate towards meeting the desired outcomes of the economy.

11.2 Many agencies exist who seek to ensure the socio-economic empowerment of women, they remain uncoordinated and their efforts are therefore not collaboratively achieving the national objective of ensuring an inclusive economy as women are still disadvantaged.
11.3 These many challenges that women are faced with provides a relevant rationale for the type of delivery mechanism being envisaged as it will focus on solely targeting the inclusion of women. While some efforts have been made to address some of the generic challenges, the desired impact from these efforts is limited, largely due to the lack of a dedicated and collaborative focus from the various spheres of society, it continues to place women at a disadvantage as compared to men, but importantly it limits the efforts of women as they are unable to sustain and grow their livelihood through financial inclusion.

11.4 The department of Women is proposed as the lead department in bringing together the various role players and assisting them in the process of implementing a Gender Responsive Planning and Budgeting Strategy that is aligned to the envisaged framework.

11.5 The Department of Women will undertake functions that are designed to inform and govern all matters relating to women’s economic empowerment through developing an implementable national Gender Responsive Planning & Budgeting Framework.

11.6 The Department of Women will be the central repository for supporting the necessary programmes and initiatives, its key primary purpose being to achieve these objectives through an integrated national coordination that will form an integral part of ensuring the general effectiveness of this government wide service-delivery mechanism.

12. Recommendations

It is recommended that the Executive Authority:

12.1 Notes and approves the content of the developed draft Gender Responsive Planning & Budgeting Framework.

12.2 Supports the consultations to be undertaken at the Economic Sectors, Employment and Infrastructure Development (ESEID) cluster and for further tabling at Cabinet.