

# Chapter 10

## ASSESSING GENDER RESPONSIVE BUDGETING IN LOCAL GOVERNMENT

### 10.1 Introduction

In committing itself to achieving gender equality and empowerment of women, the South African government has adopted a number of measures that include antidiscrimination legislation and affirmative action policies. In many countries, governments are increasingly resorting to gender-responsive budgeting (GRB) to turn their gender-equality commitments into reality. GRB (also known as gender budgeting or gender-sensitive budgeting) uses the budget to promote gender equality (Budlender, 2008; **Chakraborty**, 2007; Reyes, Budlender and Melesse, 2009; World Bank, 2005). Its objective is not to formulate a separate budget for women but to promote budgetary processes that are sensitive to the different needs of men, women, boys and girls.

Gender budgeting, is different from, yet is a component of, gender mainstreaming.<sup>1</sup> GRB recognises that traditional budgeting systems are fundamentally patriarchal and fail to recognise the contribution of women – the primary (unpaid) caregivers – to the national fiscus. As unpaid care work does not carry a price tag, and society does not pay for it, policy-makers often assume that its supply is limitless, and care receivers can have as much as they want (Budlender, 2004a).

Gender budgeting is an innovative strategy for achieving gender equality. It makes the fiscal space more democratic and the budgeting process rational, thereby promoting accountability and changing the budget focus to gendered outputs and outcomes (Çağatay *et al.*, 2000). However, although budgeting is based on rational analysis, at heart it is a contested political process that relies on value judgments.

Given the poverty profile of South Africa, any attempt to target public resources at the poor must confront gender-related issues head on. In the mid-1990s, gender budgeting began to be implemented at national level, but the process has gradually lost momentum. It is unclear how these gender commitments are being translated into fiscal commitments at local level. Yet gender-budget initiatives are needed most at local level, where gender disparities in basic services provision are more glaring. Thus, the purpose of this chapter is to assess the gender sensitivity of budgeting in local government in South Africa.

#### 10.1.1 Statement of the Problem

The South African government has shown its commitment to gender equality through various policy and legislative interventions. The country is also a signatory to several international conventions, protocols and frameworks, whose objectives are to advance the cause of women in the socio-economic fabric of the country. These conventions, protocols and frameworks include the Convention on the Elimination of all Forms of Discrimination Against Women (CEDAW), the Beijing Platform of Action and the Millennium Development Goals (MDGs).

Despite these commitments, unacceptable gender inequalities remain. African female-headed households are the poorest of the poor in South Africa. According to Statistics South Africa (StatsSA, 2011), 43.8% of households in South Africa are headed by females. Of these female-headed households, 22.8% fall into the poorest quintile 1 compared to 18.1% of male-headed households, and only 31% fall into quintiles 4 or 5, compared to 45% of male-headed households. It is time to look at alternative levers for change.

One avenue that should receive greater emphasis is the intergovernmental fiscal relations (IGFR) system. A successful IGFR system would be sensitive to the needs of women and contribute to moving them out of poverty. Ensuring that

<sup>1</sup> Gender mainstreaming refers to a process that is goal orientated. It recognises that most institutions consciously and unconsciously serve the interests of men and encourages institutions to adopt a gender perspective in transforming themselves. It promotes the full participation of women in decision making so that women's needs move from the margins to the centre of development planning and resource allocation.

resource allocation is gender sensitive will require innovations in policy design and implementation. One such innovation is GRB, but to date very little research has been done in this area. This chapter evaluates gender budgeting in the local government sector and considers whether budgets perpetuate gender disparities by *not* considering that men and women have different roles and responsibilities in society.

### 10.1.2 Objective of this Chapter

This chapter's objective is to assess the gender responsiveness of local government budgets in South Africa and to evaluate them systematically through gender lenses. In addition, the chapter recommends possible interventions by municipalities and other stakeholders to advance gender equality through the IGFR system.

### 10.1.3 Rationale of the Study

This study will benefit the work of the Commission and other stakeholders. The Commission promotes, through fiscal frameworks, equity, efficiency, transparency and accountability in the use of public resources. Given that genderless budgets are inefficient and do not accord with the principles of equality enshrined in the Constitution, this work will add value to the Commission's advisory inputs to take into account the gender impacts of budgets. In addition, this study sits well within the Commission's broader research strategy, particularly around the 'second-generation' issues that require the equitable and efficient allocation of public resources to make a positive impact on communities. The project aligns with the Commission's 2013/14 Annual Submission theme of "Moving People Out of Poverty: Supporting Innovation in Intergovernmental Financing", as it searches for innovative ways of using the fiscal framework to promote inclusive development.

A gendered perspective of budget analysis will also add value to Parliament's oversight work. This study originated from a request by the Select Committee on Cooperative Governance and Traditional Affairs and can therefore assist the Committee in ensuring that public resources are allocated effectively and efficiently and that they are better targeted. Furthermore, the study will benefit officials involved in formulating budgets at local, provincial and national level by raising awareness of the need for gendered budgets as well as their meaning and implications.

## 10.2 Literature Review

Although studies on gender are common in the fields of sociology, micro-economics, labour economics and development economics, studies on the implications of fiscal policies on gender – and gender budgets in particular – are relatively few (Stotsky, 2007). However, since the 1995 Beijing Conference on Women and the advent of MDGs in 2000, there has been a significant amount of research into gender budgeting. These two events galvanised many governments to affirm their commitment to gender equality and to use their budgets to translate their gender equality commitments into fiscal commitments. The studies cover topics that range from conceptualising gender budgets (Elson, 2003; Sarraf, 2003) to developing tools and methodologies for evaluating budgets through gender lenses, (Balmori, 2003; Budlender and Hewitt, 2003; Budlender *et al.*, 2002a; Budlender *et al.*, 2002b; Elson, 2003, Sharp, 2003; Sarraf 2003; UNIFEM, 2005; and World Bank 2005). Studies evaluating gender budgeting in different country settings (Stotsky, 2007; Chakraborty, 2007; Chakraborty and Bagchi, 2007) suggest that, despite efforts to formulate gender-responsive budgets, many countries (including South Africa) still have gender-blind budgets. The reasons for this include ignorance, gender-biased culture, lack of gender budgeting expertise and limited gender-disaggregated data (Sarraf, 2003).

### 10.2.1 Country Experiences with Gender Budgeting

#### **Australia**

Australia was the pioneer in gender budgeting. Starting around 1984, and driven by bureaucrats and feminist lobbyists within the state, Australia's gender budgeting initiatives focussed on the expenditure side of the budget but paid little attention to the gender implications of the revenue component. Initial research on gender sensitivity of budgets indicated that Australian budgets were not gender neutral, — only 1% of budget allocations benefitted women.

The Australian initiative fizzled out in the 1990s mainly because a social democratic regime had launched it during a period of economic expansion. The initiative was abandoned during the economic restructuring that took place amid the neo-liberal policies of the 1990s. This demise highlights the importance of civil society involvement and ownership. Without civil society participation, the wholly government-owned programme was vulnerable to ideological changes.

The Australian experience shows that civil society ownership is very important for sustainability of the gender budgeting process (Çağatay *et al.*, 2000).

The initial Australian experience of gender budgeting may have folded quickly, but it inspired many other initiatives worldwide. In turn, having been influenced by other successful gender budgeting programmes, Australia's gender budgeting initiatives appear to be making a comeback (Sharp and Broomhill, 2002).

### **India**

As early as 1980, civil society in India began evaluating state budgets through the lens of poor men and women. India's gender budgeting took the form of social audits, which aimed to make the budgeting processes responsive to the social needs of both poor men and women. The guiding principle was that the budget process should be participatory, accountable and transparent (Çağatay *et al.*, 2000). Driven strongly by civil society, coupled with extensive mobilisation of poor communities, another critical component was the right to information campaigns. The Indian initiative provides two lessons that could underpin a successful gender budgeting process:

- (i) The right to adequate information for all
- (ii) A strong civil society movement.

### **Tanzania**

A distinguishing feature of Tanzania's gender budgeting process was that it was externally driven by a non-governmental organisation (NGO): Tanzania Gender Networking Project. Subsequently, a strong coalition formed consisting of planners and budget officers from the Ministry of Finance, National Planning Commission, Health and Education and Agriculture, Industry and Commerce, academics and gender activists. The initiative emphasised policy development, planning and budgeting, decision-making processes and the horizontal allocation of budgetary resources among sectors. The coalition also lobbied for legislative reforms to close gender gaps. The Tanzanian initiative focused on building capacity for analysing gender budgets through (a) developing checklists for the finance ministry to facilitate gender mainstreaming of budget processes and (b) formulating guidelines to collect sex-disaggregated data for budgeting processes. Important lessons from Tanzania's experience are:

- (iii) The need for a broad involvement of many actors, including government, NGOs, academics, civil society and parliamentarians.
- (iv) Empowering NGOs, academics, civil society and parliamentarians with skills to hold government accountable.
- (v) Capacity building to mainstream gender for successful gender budgeting.

### **South Africa**

Dating back to 1995, a distinguishing feature of South Africa's gender-budgeting initiative was its location both within and outside government. Although the process was externally initiated (in contrast to Australia), the government later pursued a parallel process. The externally driven process, known as the 'Women's Budget Initiative' (WBI), was spearheaded by NGOs, academics and a group of parliamentarians (Commonwealth Secretariat, 1999). In 1997, National Treasury drove government's parallel initiative, which lost momentum soon after its introduction. However, the Parliament/NGO-driven initiative made several inputs into analysing budgets. In the first three years, it evaluated budgets of 27 national portfolios using set criteria (Budlender, 2005; Sharp, 2003; Budlender *et al.*, 2002a; Budlender *et al.*, 2002b). Focusing on national, and to a lesser extent provincial, governments, the results were published in a series of books (i.e. the First/Second/Third and Fourth Budget Initiatives) that continue to influence thinking on gender budgeting issues, (Budlender, 1996, 1997, 1998, Sarraf, 2003). The WBI used such research to lobby for gender-sensitive policy changes.

Local government only featured in the fourth year, when the gender sensitivity of five of the 800 municipalities was evaluated. This research culminating with "The Fourth Women's Budget Initiative", which focused, among other things, on service provision in local government and the impact of spending and revenue-raising on women (Budlender, 1997).

Country experiences of gender budgeting provide important lessons:

- To sustain momentum, gender budgeting needs strong alliances of key stakeholders, such as Parliament, NGOs, civil society, academics and media. The involvement of non-state parties ensures that changes in government or ideology do not compromise the process.
- Capacity building (on gender budgeting and on general budgeting principles) is essential for budget officers, parliamentarians and civil society, as levels of financial literacy are low.
- The availability of adequate sex-disaggregated data is an important success factor.

### 10.3 Research Methodology

In assessing the gender responsiveness of local government budgets, the study followed a two-pronged approach. First, the study reviewed Integrated Development Plans (IDPs) of 30 randomly selected municipalities. IDPs are crucial documents that provide insights into the strategic goals and detailed action/implementation plans of municipalities. An IDP is an excellent tool to check a particular municipality's commitment to women empowerment and gender equality, as the local budget's aim is to provide resources to the IDP. Therefore, if the IDP and its underlying sector plans are not gender sensitive, the underlying budget is unlikely to be gender sensitive.

Second, the study assesses gender responsiveness of municipal budgeting processes through case studies of municipalities, with a particular focus on local economic development (LED), water and sanitation, early childhood development (ECD) and housing infrastructure. These four sectors were selected because they are well known to ease the plight of women and, as such, are good quality of life indicators.

The case studies covered seven municipalities across four provinces: Gauteng, Western Cape, Eastern Cape and Free State. The municipalities were selected based on their size and location with a good mix of small, medium and large (based on population), and rural and urban municipalities. The following municipalities were selected:

- City of Cape Town Metro Municipality – Western Cape
- Thabo Mofutsanyane District Municipality – Free State
- Mafube Local Municipality – Free State
- Emfuleni Local Municipality – Gauteng
- Randfontein Local Municipality – Gauteng
- Amathole District Municipality – Eastern Cape
- Maletswai Local Municipality – Eastern Cape

Interviews were conducted with the mayors, relevant municipal officials and gender focal persons with additional focus group discussions. The 30 randomly selected municipalities are shown in Table 10.1.

Table 10.1. Sample of municipalities

Random sampling of 30 municipalities – IDPs to be scanned for GRB					
1xMETRO					
				(area km <sup>2</sup> )	(Pop <sup>n</sup> 2007)
1.	Mangaung Metropolitan Municipality	MAN	Bloemfontein	6,284	752,906
9xDMs					
1.	Alfred Nzo District Municipality	DC44	Mount Ayliff	10,732	900,487
2.	Fezile Dabi District Municipality	DC20	Sasolburg	21,301	474,089
3.	West Rand District Municipality	DC48	Randfontein	4,087	754,903
4.	uMgungundlovu District Municipality	DC22	Pietermaritzburg	8,934	988,837
5.	Capricorn District Municipality	DC35	Polokwane	16,988	1,243,167
6.	Gert Sibande District Municipality	DC30	Secunda	31,841	890,699
7.	Ngaka Modiri Molema District Municipality	DC38	Mafikeng	27,889	798,783
8.	Namakwa District Municipality	DC6	Springbok	126,836	126,494
9.	Overberg District Municipality	DC3	Bredasdorp	11,405	212,787
20xLMs					
1.	Mbhashe Local Municipality	EC121	Dutywa	3,050	262,008
2.	Ntabankulu Local Municipality	EC444	Ntabankulu	1,456	141,358
3.	Sundays River Valley Local Municipality	EC106	Kirkwood	3,508	34,935
4.	Kopanong Local Municipality	FS162	Trompsburg	15,248	49,422
5.	Tokolologo Local Municipality	FS182	Boshof	9,326	21,323
6.	Merafong City Local Municipality	GT484	Carletonville	1,631	215,865
7.	Mogale City Local Municipality	GT481	Krugersdorp	1,099	319,641
8.	uMlalazi Local Municipality	KZN284	Eshowe	2,214	175,372
9.	uMhlabuyalingana Local Municipality	KZN271	Kwangwanase	3,619	163,694
10.	Umzumbe Local Municipality	KZN213	Mtwalume	1,259	176,287
11.	Thulamela Local Municipality	LIM343	Thohoyandou	2,899	602,819
12.	Blouberg Local Municipality	LIM351	Senwabarwana	4,541	194,119
13.	Mkhondo Local Municipality	MP303	Piet Retief	4,882	106,452
14.	Emalahleni Local Municipality	MP312	Witbank	2,678	435,217
15.	Kgetlengrivier Local Municipality	NW374	Koster	3,973	37,806
16.	Tlokwe Local Municipality	NW402	Potchefstroom	2,674	124,351
17.	Khéi-Ma Local Municipality	NC067	Pofadder	8,332	12,571
18.	Nama Khoi Local Municipality	NC062	Springbok	15,025	54,644
19.	George Local Municipality	WC044	George	1,072	136,542
20.	Cape Agulhas Local Municipality	WC033	Bredasdorp	2,841	28,444

## 10.4 Findings

### 10.4.1 Gender Responsiveness of IDPs

The IDP is a planning tool and process that involves the municipality and its citizens in finding solutions to achieve good long-term development. It considers the existing conditions and problems that citizens experience and outlines the human and financial resources that are available for development. Therefore, the IDP is an excellent tool to check a particular municipality's commitment to women empowerment and gender equality.

A total of 30 municipalities' IDPs were scanned for their gender sensitivity. The scanning process used a framework to assess to what extent gender mainstreaming is taken into account in the planning and implementation of service delivery programmes in each municipality. Tables 10.2 and 10.3 provide the main findings of the IDP scans of the 30 municipalities.

Table 10.2. An assessment of the gender responsiveness of IDPs

MUNICIPALITY	Gender Mainstreaming	Women Empowerment	Gender Equality	Gender Equity	PGDP/ MDG Support	Sex Disaggregation	Projects: Calendar	Projects: Health	Projects: Gender Based Violence	Projects: LED	Projects: ECD
	(refers to the words / terms in the current IDP. *yes)										
<b>Metro</b>											
Mangaung Metropolitan Municipality	*			*	*	*		*	*		
<b>District Municipalities</b>											
Alfred Nzo District Municipality				*	*	*				*	
Fezile Dabi District Municipality		*	*		*		*	*	*	*	
West Rand District Municipality		*		*		*	*	*	*	*	
uMgungundlovu District Municipality	*	*	*	*		*		*	*		
Capricorn District Municipality	*	*	*	*	*	*	*	*	*	*	
Gert Sibande District Municipality	*	*		*	*	*	*	*	*	*	
Ngaka Modiri Molema District Municipality				*		*	*		*		
Namakwa District Municipality		*							*		
Overberg District Municipality				*		*				*	
<b>Local Municipalities</b>											
Mbhashe Local Municipality	*	*	*			*		*		*	
Ntabankulu Local Municipality				*		*		*	*	*	*
Sundays River Valley Local Municipality		*	*	*	*	*		*		*	*
Kopanong Local Municipality		*	*		*	*		*	*	*	*
Tokolologo Local Municipality				*							
Merafong City Local Municipality		*		*		*	*	*	*	*	*
Mogale City Local Municipality		*		*		*	*	*	*		*
uMlalazi Local Municipality						*		*			*
uMhlabuyalingana Local Municipality				*		*					
Umzumbe Local Municipality		*	*	*	*	*	*	*			
Thulamela Local Municipality	*			*		*	*	*	*	*	
Blouberg Local Municipality											*
Mkhondo Local Municipality		*	*	*	*	*		*	*		*
Emalahleni Local Municipality	*	*		*		*		*	*		*
Kgetlengrivier Local Municipality											
Tlokwe Local Municipality				*	*	*			*	*	*
Khâi-Ma Local Municipality											
Nama Khoi Local Municipality				*							
George Local Municipality				*			*	*			*
Cape Agulhas Local Municipality				*	*	*					

Table 10.2 reveals the following:

**Gender Mainstreaming.** Even though nearly all the IDPs mention women's projects, only 23% refer to gender mainstreaming. This shows the lack of a formal approach to women empowerment and gender equality in the planning and budgeting processes of all departments across the municipality.

**Women Empowerment.** Women empowerment is mentioned in 47% of the IDPs and refers to building critical skills and self-confidence among women in order to enable them to take control of their lives. Empowerment of women is essential for transformation because it addresses the structural and underlying causes of subordination and discrimination of women in their homes, in the workplace, and in religious and cultural institutions.

**Gender Equality and Gender Equity.** Gender equity is referred to in 73% of IDPs, but only 27% refer to gender equality. Gender equity is the fair and just distribution of opportunities and resources between women and men. In line with the *Employment Equity Act* (No. 55 of 1998), the equity process simply focuses on workplace recruitment of women within the municipality, and so many municipalities appear to be complying with legislation by 'playing the numbers game'. However, in comparison, gender equality refers to the existence of equal conditions for both genders in realising their full human rights and potential, whereby they are able to contribute equally to political, economic, social and cultural development and benefit equally from the results.

**Sex-disaggregated Information.** Information disaggregated by sex is provided in 73% of the IDPs but is only in relation to profiling populations and unemployment. Yet even this basic information is apparently not used in the planning and budgeting process.

**Women's Health.** Women's health projects are mentioned in 60% of IDPs and predominantly concern raising awareness of HIV and AIDS and condom distribution. Maternal health issues and Prevention of Mother to Child Transmission (of HIV/AIDS) are sometimes mentioned, responses to a fuller range of health issues affecting women appear to be largely ignored.

**Local Economic Development (LED).** Only 43% of the IDPs allude to supporting women through LED projects. Even where LED support is indicated, projects tend to be either part of the Expanded Public Works Programme (which lacks long-term sustainability) or to 'fit' a constructed role of women (e.g. sewing and catering), which require small amounts of investment.

**Gender-based Violence (GBV).** Just over half (53%) of the IDPs mention supporting projects that deal with GBV, which is of particular concern because of increased levels of crimes against women.

**ECD.** Only 37% of IDPs mention ECD support programmes. Although ECD is largely the responsibility of provincial governments, municipalities are their partners in registering, ensuring compliance and supporting ECD centres. ECD is also an area where women in their roles as primary caregivers of young children experience substantive equality.

**Women Events.** A significant amount of resources goes towards events such as rallies, food or transport, with 33% of IDPs referring to calendar projects (e.g. Women's Month, Sixteen Days of Activism, etc.). However, such events do not improve the lives of women or lead to substantive equality.

In summary, four key messages stand out from the evaluations of municipal IDPs.

### ***There is a lack of gender mainstreaming and women empowerment***

Most municipalities show no formal strategy for women's empowerment. An exception is Maletswai, which includes gender-specific planning and budgeting in the areas of LED and GBV. However, these achievements are subject to poor recording and monitoring processes because of a lack of strategy. The gender-specific processes and programme activities mentioned by other municipalities tend to be associated with calendar events. For example raising awareness during Women's Month or the Sixteen Days of Activism. LED projects aimed at economic empowerment tend to be aligned with women's constructed roles e.g. in the areas of catering and care. In addition, many of these projects are not aligned to the municipality's economic strengths, which makes them unsustainable and the women only temporarily supported.

The absence of a gender-mainstreaming approach does not imply that gender mainstreaming and women empowerment activities are not being pursued. However, municipalities must move away from a 'calendar event' approach to gender mainstreaming becoming more closely associated with the municipality's core business of the municipality (rather

than an add-on). More effective planning, budgeting and monitoring of women empowerment and gender equality will ensure when gender mainstreaming is part of all departments' specific processes and programmes.

### ***Gender equality is seen as a social development issue***

All municipalities are concerned that women's issues appear to be 'pushed' into the area of social development, yet none of the 30 municipalities has integrated women empowerment into their core business and broad planning.

Viewing gender equality only within the context of social problems limits the way in which the substantive equality goals (decision making, resourcing and opportunities) should be addressed. In other words, this limitation fails to recognise the importance of women's economic access to available opportunities and of interventions that target women's skills development, productivity and financial independence (including independence from government grants).

### ***The main focus is gender equity, not mainstreaming for gender equality***

Most IDPs use equity language and, while the equity process is a good entry point into gender mainstreaming and women empowerment, it often stops at the point where the numbers look reasonable. Gender equity, which is about female representation, is often the main focus, not gender equality. Yet gender equality goes beyond gender equity to encompass gender mainstreaming and general empowerment of women.<sup>2</sup>

Nearly all municipalities declare support for gender mainstreaming because of the growing numbers of women at senior and middle management levels and in prominent political portfolios, such as mayors and speakers. Mafube and Randfontein declare that gender mainstreaming is a high priority, despite showing very little evidence of gender-equality measures that target women across the municipality, although they have been more successful at increasing the numbers of women in management and leadership positions. Municipalities are clearly making inroads in ensuring that women occupy more portfolios. However, these positions assume that women in leadership support gender mainstreaming and that an equity process (closing the numbers gap in this case) will lead to substantive equality of citizens.

Therefore, the equity process is a good entry point into gender mainstreaming and women empowerment but often stops when the numbers look 'balanced'. Once this happens, the process is neglected and regression of gains can take place. The literature shows that gains made during the 1990s and early 2000s have regressed, with, for example, decreasing numbers of women councillors.

Finally, an equity process should not be equated with actual interventions for gender mainstreaming across all sectors where substantive equality is the goal. Institutions are likely to just report numbers without clear targets (numbers and percentages) for the interventions and gender-specific indicators to measure the success of mainstreaming.

### ***Gender equality commitments are not translated into fiscal commitments***

Without a clear gender-mainstreaming strategy, IDPs generally group women, children, youth, the elderly and people with disabilities together, as if the group is uniform and with similar needs. Numbers and targets are applied to this group without detailing how different sub-groups will benefit from the resources (e.g. 50% of women will participate in LED programmes).

IDPs show little evidence of planning processes and budgets for gender mainstreaming in key areas of delivery e.g. LED, water and sanitation and housing (areas of significant expenditure), while most municipalities are silent on ECD (a crucial component of women's productivity).

#### **10.4.2 Case Studies**

The findings of the seven municipality case studies are discussed below:

##### ***Maletswai Municipality***

###### **Background**

Maletswai Municipality is a largely agricultural area located in the Eastern Cape Province, with a population of 42 846 people. The 2001 census revealed that 82% of the economically active population in the Maletswai Municipality lived

<sup>2</sup> Gender equity forms the building block for gender equality. The concept of gender equality refers to full equal rights (political, economic, civil, social and cultural) between men and women, with no one denied such rights.

below the poverty line (earning less than R800 per month), and 54% receive no fixed monthly income. In 2005, the unemployment rate stood at 38.7%, (Maletswai Municipality, 2005), with the highest rates found in the Masakhane (51.2%), and Jamestown (43.5%).

### **GRB in Maletswai Municipality**

Maletswai Municipality is critically aware of women empowerment and gender equality and has a process in place of moving towards developing gender-mainstreaming approaches and budgets. However, officials and community leaders indicated that resources are limited for instituting gender mainstreaming across the board. Gender-mainstreaming projects are driven by donor funding rather than by intergovernmental transfers.

At an institutional level, the municipality has shown commitment to GRB, by appointing a dedicated gender focal person (GFP) who operates from a functioning special programmes unit (SPU).

Furthermore, the municipality supports a number of projects that target women as stakeholders (beneficiaries and implementers). Examples of such LED projects are the refurbishment of Aliwal North Spa, a recycling project and a butchery – tenders for these projects were awarded to women-owned companies. In addition, funds have been sourced to support projects to help victims of GBV. In the area of ECD, the municipality is in the process of providing land for a crèche. Although the SPU liaises with the provincial department on ECD issues, ECD is not viewed as one of the competencies of local government. Furthermore, the GFP is not involved in housing and water and sanitation operations in part because of the limited understanding of the broader portfolio of a GFP within the municipality.

### **Why GRB is absent in Maletswai Municipality**

GRB in Maletswai takes place by default, as the municipality has no gender-mainstreaming policy, and officials have very little or no knowledge of gender mainstreaming as a technical process. On the other hand, citizens (especially women) are not well informed about how they can engage with the IDP process to ensure more effective gender-related planning and consultation. Lastly Maletswai needs to collect sex-disaggregated data to enable GRB.

### **Recommendations for gender sensitive budgeting for Maletswai Municipality**

As gender mainstreaming takes place by default in certain areas of the municipality and gender budgeting is non-existent, Maletswai Municipality needs to:

- Develop a gender policy and a gender-mainstreaming plan of action.
- Train decision makers (officials and political principals) in gender mainstreaming.
- Train budget officers in GRB and planning.
- Develop reporting mechanisms that include sex-disaggregated data.
- Endeavour to collect sex-disaggregated data to inform gender mainstreaming, including gender mainstreaming the budget.

## ***Cape Town Metropolitan Municipality***

### **Background**

The City of Cape Town Metropolitan Municipality is a large urban area with a high population density and many centres of economic activity. Over the last 20 years, Cape Town has experienced rapid urbanisation, which has resulted in its population almost doubling to its current total of 3.5 million. This growth was a result of the 1% annual population growth through natural family formation, and through continued in-migration of approximately 50 000 people (18 000 households) per year, most of whom come to Cape Town in search of jobs.

Service provision, housing, and job creation are priorities for the city. The current IDP formulates a city-wide strategic urbanisation plan, where the focus is to create communities with access to good quality public spaces and services. The eight strategic areas include shared economic growth and development; sustainable urban infrastructure and services; energy efficiency; public transport systems; integrated human settlements; safety and security; health, social and community development; and good governance and regulatory reform.

### **GRB in Cape Town Metropolitan Municipality**

The Cape Town Metropolitan Municipality is adopting a formal gender-mainstreaming approach. The municipality's eight strategic focus areas provide entry points into a mainstreaming approach. Projects, such as the 2020 Economic Development Strategy, training for ECD practitioners and construction of tourism centres, are some of the programmes that link gender equality and women empowerment to the core business of the municipality.

At an institutional level, the municipality has shown commitment to GRB by appointing dedicated GFPs who operate across departments and who form part of the municipality's Gender Task Team. Members of this team report on internal processes and support service managers to mainstream gender. A gender mainstreaming strategy also influences operations within Corporate Services and Social Development.

During the interview process, officials involved in public participation, employment equity, IDP, human settlements and social development provided information that showed an understanding of the strategic approach needed to assist with GRB processes, for example, working towards gender mainstreaming by training senior managers, developing more gender equality indicators and undertaking more public expenditure incidence analysis. Gender equality is monitored on some levels (e.g. employment equity and progress towards achieving objectives against indicators on the City's scorecard), while programmes and projects that support women's empowerment are already in place and form part of departmental business plans. However, many of the LED projects for women still fall into the domain of welfare and crafts (the constructed roles of women).

### **Why GRB is limited in Cape Town Metropolitan Municipality**

During the interviews, officials indicated that some GRB is taking place, albeit in an ad hoc manner and focusing more on the welfare part of women's lives. Key reasons as to why GRB is limited include:

- Lack of a gender policy in place, which results in senior management continuing to shift the responsibility and accountability for gender equality to lower-level officials.
- Absence of a gender-mainstreaming policy that provides the necessary guidelines for GRB across the municipality and takes account of the complexity of a metro and its institutions
- Shifting of gender equality and women empowerment to social development/welfare, as a clear policy and strategy that reflect gender mainstreaming is absent; other key sectors such as LED and housing do not take responsibility for gender equality.

### **Recommendations for GRB for Cape Town Metropolitan Municipality**

Gender mainstreaming is poorly understood and so mainstreaming and GRB are not taking place. The City of Cape Town Metropolitan Municipality needs to:

- Train key decision makers (senior managers and political principals) in gender mainstreaming and GRB.
- Finalise the draft gender policy and implement a gender-mainstreaming strategy and plan of action that guides departments across the municipality.
- Train implementers in GRB and planning as well as budget officers to assist with tracking expenditure.
- Develop a monitoring and evaluation system that supports gender-responsive reporting (including the collection of sex-disaggregated data) across all departments.
- Utilise the eight strategic areas of focus to gain entry into gender mainstreaming and contribute to GRB across the municipality.

### ***Mafube Local Municipality***

#### **Background**

Mafube Local Municipality is situated in the Free State Province. Nearly 25% of the population is dependent on manufacturing, and unemployment stands at around 24.6%. In Mafube, 77% of people live in poverty and 26.8% of households have no income.

### **GRB in Mafube Local Municipality**

Mafube Local Municipality has no formal gender-mainstreaming processes or gender budgeting in place.

#### **Recommendations for GRB for Mafube Local Municipality**

Gender mainstreaming is a poorly understood concept within the municipality, and GRB is absent. Mafube Local Municipality needs to:

- Train decision makers (officials and political principals) in gender mainstreaming and GRB.
- Appoint a GFP.
- Develop a gender policy and gender-mainstreaming plan of action.
- Train implementers in GRB and planning.
- Develop reporting mechanisms that include sex-disaggregated data.

### ***Thabo Mofutsanyane District Municipality***

#### **Background**

Thabo Mofutsanyane District Municipality is located in the Free State Province, and 57% of its residents live in rural areas. The unemployment rates within this district municipality are the highest in the province, at an average of 36.55%, although unemployment levels vary considerably among the local municipalities: Setsoto (23.11%) and Nketoana (23.94%) show lower levels than others, while Maluti a Phufong (49.42%) has the highest. The decline in the agricultural sector has adversely affected employment in the district. The district municipality was placed under Section 139(b) between November 2009 and September 2010.

#### **GRB in the Thabo Mofutsanyane District Municipality**

There is no evidence that the municipality is involved in gender mainstreaming. However, the mayor has requested a shift away from budgeting for events to budgeting for programmes that benefit citizens' standard of living. This is an opportunity to consider how gender mainstreaming is approached in the municipality.

#### **Why Gender Budgeting is absent in Thabo Mofutsanyane District Municipality**

Institutional arrangements do not support GRB, and officials have very little or no knowledge of gender mainstreaming and GRB.

#### **Recommendations for GRB in Thabo Mofutsanyane Municipality**

The possibility is unrealistic in a municipality that experiences a range of difficulties and where gender mainstreaming is a poorly understood concept. Thabo Mofutsanyane Municipality needs to:

- Train decision makers (officials and political principals) in gender mainstreaming and GRB.
- Ensure that the GFP has a job description and budget (as well as a computer).
- Determine the role of the district in providing support for and monitoring of gender mainstreaming with the municipality, as well as within the local municipalities.
- Develop a gender policy and gender-mainstreaming plan of action.
- Train implementers in GRB and planning.
- Develop reporting mechanisms that include sex-disaggregated data.

### ***Emfuleni Local Municipality***

#### **Background**

Situated in Gauteng Province, Emfuleni Local Municipality is a largely urbanised municipality, with a high population and density compared to other municipalities in the Sedibeng District. Emfuleni Local Municipality houses around

80% of the district's total population and is the economic hub of Sedibeng. However, unemployment (at 54%) is the highest in the province and is rising, driven primarily by immigration of unemployed people from other provinces into the area.

### **GRB in Emfuleni Local Municipality**

There is little evidence to suggest that women are recipients of gender equality and women empowerment interventions in the municipality. However, the GFP, a recent appointee, has suggested that the municipality (political principals and senior managers) prioritise gender mainstreaming.

### **Why GRB is absent in Emfuleni Municipality?**

GRB is not possible where officials have very little or no knowledge of gender mainstreaming, while the absence of a gender policy, a gender-mainstreaming strategy and plan of action does not support a gender-responsive approach. Without these key enablers, even with a GFP now in position to provide the necessary support, the municipality will not be able to ensure that all departments implement gender mainstreaming and GRB.

### **Recommendations for GRB in Emfuleni Local Municipality**

Gender mainstreaming is a poorly understood concept leading to an absence of GRB. Emfuleni Local Municipality needs to:

- Train decision makers (officials and political principals) in gender mainstreaming and GRB.
- Develop a gender policy and gender-mainstreaming plan of action.
- Train implementers (including budget officers) in GRB and planning.
- Develop reporting mechanisms that include sex-disaggregated data.

### **Randfontein Local Municipality**

#### **Background**

Randfontein Local Municipality is situated in Gauteng province and is home to a population with low levels of education and income. Nonetheless, it has become a migration destination for many South Africans from other provinces, especially the North West Province, seeking a better quality of life.

### **GRB in Randfontein Local Municipality**

The municipality attaches significant interest to empowering women through support for women in LED and as beneficiaries of tenders. However, these projects fall within the constructed roles of women (e.g. provision of clothing and uniforms, poultry farming) and, as officials note, tend to be ad hoc rather than part of a deliberate strategy towards women empowerment and gender equality. Nonetheless, such projects serve as good entry points towards a gender-mainstreaming approach.

The municipality is conscious of its role in ECD and gives varying levels of support to the 92 centres registered in the municipality.

Another example of female empowerment is the awarding of one tender to a woman in housing construction during the last financial year. No further information was provided during the assessment.

### **Why GRB is absent in Randfontein Local Municipality?**

Moving away from women-specific projects towards a sustainable approach to women empowerment and gender equality will be difficult because existing institutional arrangements and strategic interventions do not support an approach to gender mainstreaming across the municipality. For example, there is no GFP or SPU, no gender policy and no gender-mainstreaming strategy to support GRB across all departments of the municipality. Furthermore officials have very little or no knowledge of gender mainstreaming.

### **Recommendations for GRB in Randfontein Local Municipality**

Although there are women-specific projects, gender mainstreaming is a poorly understood concept leading to an absence of GRB. Randfontein Local Municipality needs to:

- Appoint a GFP.

- Train decision makers (officials and political principals) in gender mainstreaming and GRB.
- Develop a gender policy and gender-mainstreaming plan of action.
- Train budget officials in GRB and planning.
- Develop reporting mechanisms that include sex-disaggregated data.

### **Amathole District Municipality**

#### **Background**

Amathole District Municipality is situated in the Eastern Cape province and is home to 1.7 million people. The district's economy is dominated by Buffalo City, King William's Town, Mdantsane and the provincial administrative capital Bisho. Buffalo City accounts for 42% of the district's population, 83% of the district's economic output and 72% of the district's formal employment. Sectors that provide formal employment in the district are public services (75 000 jobs), manufacturing (27 000 jobs), trade (25 000 jobs) and agriculture (17 000 jobs). The district's existing manufacturing sector includes the automotive, textile, pharmaceutical, electronics and food-processing industries. Nevertheless, unemployment and poverty levels are high, particularly in local municipalities in the former Ciskei and Transkei.

#### **GRB in Amathole District Municipality**

Although the municipality has a GFP and a SPU, the institutional arrangements do not support a mainstreaming approach, as the GFP has minimal/no influence on gender mainstreaming across all departments within the municipality. A number of intervention areas potentially support women empowerment, e.g. construction and LED projects. However, the process is ad hoc rather than part of a sustainable mainstreaming strategy for women empowerment and gender equality.

#### **Why GRB is absent in Amathole District Municipality**

The institutional arrangements in Amathole District Municipality do not support the gender equality agenda, while officials have very little or no knowledge of gender mainstreaming, making GRB unlikely.

#### **Recommendations for GRB for Amathole District Municipality**

Gender mainstreaming in the Amathole District Municipality is a poorly understood concept, and GRB is absent. The municipality needs to:

- Determine the role of the district in providing the necessary support and monitoring of gender mainstreaming within the municipality, as well as to the local municipalities.
- Provide the necessary support to the GFP and SPU to implement gender mainstreaming across the municipality.
- Ensure that the GFP is has sufficient capacity to provide support for GRB.
- Train decision makers (officials and political principals) in gender mainstreaming and GRB.
- Develop a gender policy and gender-mainstreaming plan of action.
- Train implementers and budget officials in GRB and planning.
- Develop reporting mechanisms that include sex-disaggregated data.

The findings of the seven case studies are summarised in Table 10.3.

Table 10.3. Summary of the case study findings

	Maletswai LM EC	Emfuleni LM GP	Mafube LM FS	Randfontein LM GP	Thabo Mofutsa - Nyana DM FS	Amathole DM EC	City of Cape Town Metro WC
1. Approved gender policy							
2. A gender mainstreaming strategy							*CS&SD <sup>3</sup>
3. Dedicated GFP (work portfolio)	*	*			*	*	*
4. An SPU unit	*				*	*	*
5. SPU trained in gender mainstreaming							*
6. Budget officers trained in gender mainstreaming							*some
7. Senior managers trained in gender mainstreaming							*some
8. Senior managers regard gender mainstreaming as a high priority			*	*			
9. Political principals regard gender mainstreaming as a high priority		*	*	*			
10. Gender equality part of performance agreement of senior managers							*some
11. Gender equality indicators	*some						*some
12. Information disaggregated by sex	*some			*some			*
13. All departments plan / budget for gender equality							
14. Monitoring plan for gender equality							*some
15. Sex disaggregated reporting from all departments							
16. Sex disaggregated public expenditure incidence analysis							*partly
17. Tenders issued to 100% women ownership	*			*			*
18. Tenders issued to ≥50% women ownership	*					*	*
19. Tenders issued to women-owned companies ≥R500,000	*			*		*	*
20. Tenders issued to women-owned companies ≤R500,000				*		*	*
21. ECD centres run by the municipality				*			
22. Participation of IDP officer in the completion of questionnaires	*						*
23. Participation of budget officers in completion of questionnaires	*	*	*				
24. Participation of councillors in completion of questionnaires	*						
25. Funded projects: calendar events e.g. Sixteen Days, Women's Month, etc	*	*		*	*	*	*
26. Funded projects: LED	*					*	*
27. Funded projects: GBV	*						*
28. Indicates the number of indigent women in the municipality							

NB: \* indicate existence

3 Corporate Services (CS) and Social Development (SD)

As suggested in Table 10.3, gender mainstreaming and gender budgeting in local government is limited. The reasons for this include:

- The absence of an approved gender policy across all municipalities.
- No municipality has a municipal gender-mainstreaming strategy.
- While municipalities generally provide resources (human and financial) for GFP and SPU portfolios, incumbents are not trained in gender mainstreaming and gender budgeting.
- Personnel in management (who make decisions) and budget officers (who track expenditure) have not been trained in gender mainstreaming.
- Gender equality indicators and the collection of sex-disaggregated information are limited.

The GRB study included an additional component that addressed the gender sensitivity of the budgeting process in the areas of LED, ECD, water and sanitation, and housing. These four areas of service provision impact significantly on the ability of women to experience substantive equality and are good indicators to measure quality of life.

Women are the primary caregivers, and so providing adequate water and sanitation will have an impact on women's time. This includes collecting water at the communal tap or nearest water source, as well as the availability of water for cooking, cleaning or caring for children, the elderly and sick people.

The availability of adequate housing or shelter affects the way in which women can provide for their dependents, especially given the increase in women-headed households. Adequate housing also has an impact on women's safety (their own and that of their dependents), particularly in areas that experience high levels of gender-based violence.

The availability of affordable ECD allows women to participate in other income-generating activities and to play greater roles as community leaders in public decision making. (Besides which, quality education in the early years of a child's life leads to more positive educational outcomes, enabling the next generation to shift away from the circumstances of poverty). Women experience a greater burden of responsibility for poorly educated children and unemployed young adults.

For women, the shift away from the cycle of poverty is closely linked to economic independence and the acquisition of relevant skills. Some of the barriers to women's economic empowerment include accessing financial institutions, the availability of capital, business skills and access to markets. Because women's income is so strongly linked with households' ability to shift away from poverty, the economic empowerment of women cannot be over-emphasised.

Gender responsive planning and budgeting requires commitment to a specific set of outcomes that can be reported on as part of gender equality commitments. GRB requires that municipalities implement mechanisms to disaggregate consciously all data by sex. Municipalities should comply with a set of indicators that can measure substantive equality; these four areas of service are key to assessing whether gender mainstreaming (and by implication GRB) is taking place in a municipality.

Table 10.4. Summary of findings in four areas of service provision

	Maletswai LM	Emfuleni LM	Mafube LM	Randfontein LM	Thabo Mofutsanyana DM	Amathole DM	City of Cape Town Metro
1. LED funding for companies that are 100% Women Owned	*			*			*
2. LED funding for companies which are 50%-99% Women Owned	*			*		*	*
3. Tenders of ≥R500,000 issued to Women Owned Companies	*			*		*	
4. Tenders of ≤R500,000 issued to Women Owned Companies	*			*		*	
5. A municipality has ECD Policy Guidelines (detailing operational relationship with province)				*			
6. There are ECD Centres that are registered in the Municipality	*			*			*
7. There are ECD Centres run / managed by the municipality				*			
8. Does the municipality collect sex disaggregated data on the provision of housing? If so, when was the last update?				*		*	
9. ≥ 50% of households served water pipe connection							*
10. ≥ 50% of households served by communal water pipe	*					*	*

As suggested in Table 10.4, the main finding of the seven case studies in the specific focus areas indicates that municipalities are currently not well placed to provide requested data. Mafube, Emfuleni and Thabo Mofutsanyane were unable to provide any data, while the City of Cape Town only provided data for LED. It was not possible to verify information provided by Amathole and Randfontein, as the data was filled in by one person some weeks after the fieldwork had been conducted.

## 10.5 Conclusion

If municipalities are to move towards a gender-mainstreaming approach and institutionalise GRB, the following are key areas of intervention:

- **Collection of gender-disaggregated data** is fundamental for GRB and planning. Without meaningful data on the situation of men and women, an analysis of target group(s) is not possible.
- **Sensitisation of decision makers** (political principals and officials) to raise awareness about gender issues and to provide them with skills to analyse and address issues and to act as change agents. Gender mainstreaming and GRB is not only about planning and budgeting but also about the local government approach to women empowerment and gender equality

- **Increase the number of women in the decision-making processes of local government** where they can ensure that gender commitments are translated into fiscal commitments. Within patriarchal structures, women are more likely to champion the cause of gender equality and speak directly to the needs and priorities of women.
- **Sensitisation of planning and budget officials** so that municipal officials who plan and draw up budgets see that their work may affect women and men differently. Gender sensitisation must not only focus on a change in attitudes towards patriarchy and gender equality, but also provide officials with skills to plan for gender responsiveness and to track budgets accordingly.
- **Training and capacity building** to ensure that officials can develop actions at every stage of the project cycle that supports a gender-mainstreaming approach. Awareness raising and sensitisation are not enough to empower municipal officials across all departments, but must include planning, project implementation, budgeting, community participation and monitoring and evaluation.
- **Advocacy** so that decision makers (political principals and officials) are influenced to ensure that women empowerment and gender equality is part of the municipality's strategic agenda. Raising awareness of gender mainstreaming and GRB is central to the issue of sustainability (and the move away from events-driven equality).
- **Institutionalising GRB** not simply as an add-on activity with reports provided by GFPs and SPUs. Municipal budget guidelines, including planning formats, annual budget circulars, quarterly performance and annual reporting requirements should be designed in ways that guide gender-responsive planning and budgeting.
- **Gender analysis of existing revenues and expenditures**, so that local government finance officers can promote post-budget, gender-aware impact analysis to determine GRB and the impact of public finance. The way in which government raises revenues and its pattern of public expenditures could support gender-blind macroeconomic planning, which will unfairly disadvantage women.
- **GRB guidelines** for government departments, issued by national and provincial treasuries in consultation with the Department of Cooperative Government and local governments. Gender responsive planning and budgeting requires that government departments approach gender equality as part of fulfilling their core business rather than just an add-on activity. Such guidelines would advance the agenda on gender mainstreaming and the institutionalising of GRB

## 10.6 Recommendations

Two sets of recommendations are proposed, one that requires the attention of national and provincial governments, and the other that requires the attention of municipalities themselves.

With respect to assessing gender-responsive budgeting in the local government, the Commission recommends that:

- National and provincial governments should:
  - Run gender budgeting pilots in a few municipalities first and evaluate results before wider application. These pilots could be linked to ensuring gender disaggregated data for key conditional grants as part of the grant framework in the Division of Revenue Act.
  - Ensure municipal IDPs institutionalise gender planning by sector (e.g. water and sanitation, LED etc.) and include gender disaggregated performance indicators and targets.
  - Provide gender budgeting good practice guides and toolkits.
  - Provide guidelines for collecting sex-disaggregated data for budgeting processes and ensure that municipalities have the capacity to analyse budgets from a gender perspective.
- Local government should:
  - Institutionalise gender-responsive budgeting process linked to IDPs.

- Build capacity for gender mainstreaming and GRB at local level.
- Ensure gender-responsive appropriations and budget allocations.
- Ensure gender-sensitive public participation and consultations at local level.

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