

## **Sustained Work and Dedicated Capacity: IDASA's Experience with Applied Budget Work in South Africa**

**Helena Hofbauer**

Executive Summary

The Institute for Democracy in South Africa (IDASA) is an NGO working to support the consolidation of democracy in South Africa by building civil society and governance institutions. The Budget Information Service (BIS)—a major program within IDASA founded on the basis of ensuring “budgets for the poor”—was founded in 1995 in order to provide timely and accessible public policy information on the impact of the budget on poor South Africans. BIS' 2005-2007 mission commits it to advocate “for sustainable democracy, poverty alleviation, equity and human rights realization through its research and capacity building activities...” BIS is divided into the following units: the Children's Budget Unit, the Women's Budget Unit, the AIDS Budget Unit, the Sector Budget Unit (covering health, welfare, and education budgets), and the Africa Budget Unit. At the time of the case study, BIS employed approximately 22 staff members.

BIS' efforts to eradicate poverty and bring public awareness to the budget have become well-established projects and advocacy templates in South Africa and around the world. Through the “quiet diplomacy” of building technical knowledge and producing reliable research, BIS has made advances in holding the government accountable for the use of public budgets. To do so, each unit of BIS has formed strategic partnerships with social movements in order to expand its effectiveness, and many units have used these networks to build the capacity for budget work in other CSOs. BIS has also built strong relationships with government officials who depend on its reliable, independent analysis.

BIS has had a significant impact on increasing the quantity and quality of budget information available to all stakeholders in South Africa, but particularly to civil society, the legislature and the media. It has also played a major role in raising awareness and skills for budget work in Sub-Saharan Africa.

BIS' impact also extends to its ability to help effect changes to budget allocations and expenditures in various sectors and localities. The AIDS Budget Unit has helped to boost national and provincial-level spending on antiretroviral drugs and increase grants to handle treatment of the HIV/AIDS epidemic. The Children's Budget Unit has contributed to the campaign to ensure children's access to social security benefits, spearheaded by the Alliance for Children's Entitlement to Social Security. The effort drew on budget information provided by the CBU and successfully led to an increase in the budgetary resources originally committed for the Child Support Grant when it was first introduced and to a lowered eligibility age of fourteen years. The level of the grant has since kept pace with inflation, partly as a result of ongoing monitoring and advocacy work by BIS and its allies.

The challenges that BIS currently faces will resonate in many established budget groups. The relationship between BIS and the broader IDASA is one of the most important of these challenges, particularly the issue of redefining budget groups over time so that they remain relevant to the changing mission of the parent organization and the local context. A second challenge relates to the relationship between individual project units within a budget organization. BIS has faced the common challenge between the need to specialize increasingly in particular sector budget work, and simultaneously finding ways to manage and maintain its coherence and overall mission.