



The following presents a case study of the impact that civil society budget analysis and advocacy can have on government budget policies, processes, and outcomes, particularly as these relate to efforts to eliminate poverty and improve governance. This is a summary of a more in-depth study prepared by Neill Overy as part of the Learning Program of the IBP's Partnership Initiative. The PI Learning Program seeks to assess and document the impact of civil society engagement in public budgeting.

Download a PDF of the complete case study at [www.internationalbudget.org](http://www.internationalbudget.org).

## SOUTH AFRICA: CIVIL SOCIETY USES BUDGET ANALYSIS AND ADVOCACY TO IMPROVE THE LIVES OF POOR CHILDREN

In South Africa a range of civil society organizations and coalitions have been central to post-Apartheid efforts to protect vulnerable children through social security grants. These organizations' persistent campaigning has contributed to the following budget and policy changes over the last decade:

- expanded eligibility for the Child Support Grant (CSG) through the doubling of the age range covered and increases in the income cut-off point for the grant,
- a six-fold increase in the budget for this grant between 2001-2008,
- increases in the monthly value of the grant to keep up with inflation, and
- a more flexible approach to the documentation required to access the grant.

These organizations also worked hard to improve awareness of the grant through energetic information campaigns. All these efforts have paid off handsomely: apart from the increase in the value of the grant, more than 80 percent of the children who are eligible for it are now receiving it. As a result, these organizations have made a real difference in the lives of poor children.

### THE ISSUES: ADDRESSING CHILD POVERTY

The South African Constitution of 1996 states that the government is obliged to progressively realize the right to social security within its available resources, in order to assist those who "are unable to support themselves and their dependants." As part of the government's efforts to realize



A broad coalition of civil society organizations has combined budget analysis, grassroots advocacy, and public education to dramatically strengthen South Africa's support for its poorest and most vulnerable children and their families.

Photo courtesy of the New Women's Movement, Cape Town

this right, a committee (the Lund Committee) was tasked in 1996 with assessing the existing system of support for children and families, known as the State Maintenance Grant (SMG), and with developing approaches to target children more equitably, but within the existing SMG budget. The budget constraints were seen as a result of South Africa's prevailing macroeconomic strategy at the time.

The SMG did not reach the poorest women and children — approximately 45 per 1,000 Indian and "colored" children received the grant, whereas only 2 per 1,000 African children received the grant, despite the more extensive poverty in black communities. Given the budget constraints, the Lund Committee proposed that the SMG be phased out and replaced by a new Child Support Grant (CSG) that would cover more children but at a lower monthly grant payment. The South African Cabinet agreed to phase out the SMG in favor of the CSG in March 1997 and set the initial monthly grant amount at R75 per eligible child up to the age of seven.

### THE CAMPAIGNS

Civil society was largely excluded from the deliberations and recommendations of the Lund Committee. Once this information became public, however, civil society responded. The coalition's advocacy has taken different forms, including conducting research and analysis, informing and mobilizing the public, engaging policymakers and public officials, and litigation.

## Research and Analysis

A key aspect of civil society's advocacy efforts to expand the CSG was to undertake extensive evidence-based research. Initially, the broader civil society coalition that campaigned around the CSG did not recognize the value of budget analysis and advocacy for generating evidence in support of its positions, but this quickly changed. Coalition partners identified particular issues, requested relevant budget information from organizations like the Institute for Democracy in South Africa (IDASA), and more recently, commissioned budget work from organizations like the Community Agency for Social Enquiry (CASE).

In 2000, for example, IDASA and the Children's Institute undertook work around the size of the grant. This research demonstrated how the value of the grant had fallen in real terms since its introduction in 1998. This evidence was used by Black Sash, IDASA, and the Children's Institute in a number of submissions to relevant government departments and legislative committees in 2000 and 2001. Within months of this research being completed and its findings being disseminated, the first increase in the CSG occurred. Since then, civil society also has used budget analysis effectively to demonstrate that there are already

sufficient public resources to finance an extension of the CSG to children and youths up to 18 years old.

A great deal of research also has been undertaken to investigate service delivery problems associated with the implementation of the CSG. Such work has looked at problems relating to difficulties in applying for the grant, the application of the income means test, and the ability of the Department of Social Development (DSD) to deliver the grant — both in terms of staff and general administrative capacity. This work helped to expand the reach of the CSG because it demonstrated where capacity to deliver the grant needed to be reinforced.

## Awareness Raising and Engagement

Since the early days of the CSG, civil society organizations like Black Sash, IDASA, the Alliance for Children's Entitlement to Social Security (ACCESS), and the Children's Institute have called on the government to increase the amount and age cohort of the grant and to make improvements to how it was administered. The resultant advocacy took many different forms, including raising awareness and engaging with government entities by organizing marches and petitions aimed at the DSD, Parliament, and specific members of the government, as well as

participating in policy processes.

For example, the government recently published draft regulations for a proposed extension of the CSG to children and youths up to the age of 18. Commenting on the draft regulation, a joint civil society submission was made to the Department of Social Development that highlighted and offered recommendations for resolving two main concerns with the regulations: a "start-stop" problem related to a phased-in implementation plan, and a requirement that children's caregivers provide proof of school attendance every six months. The "start-stop" problem occurs when children qualify for the grant at the start of each phase-in year of the grant but "fall off" the system once they have their birthdays and become too old to qualify for the grant. The next year, when the grant is rolled out to children who are one year older, they would qualify again, only to drop off again once they reach their birthdays. To resolve this problem, civil society groups recommended that any child born after 1 April 1994 be eligible for a grant during each of the phased extensions, regardless of their age and the current stage of the grant roll-out process.

Civil society also raised a number of issues with regard to the school attendance reporting requirement,



## TACTICS FOR THE CHILD SUPPORT GRANT CAMPAIGNS

### Awareness Raising and Engagement

- Placard demonstrations and marches
- Memorandums and petitions
- Submissions to Parliament, provincial legislatures, and commissions of enquiry

### Research and Analysis

- Analysis of budget allocations, impacts of inflation, and budget effects of broadening eligibility

- Assessment and monitoring of service delivery problems
- Assessment of the value of the CSG as an effective tool to address poverty

### Litigation

- Strategic legal actions when policy processes were blocked

including that the responsibility was placed on the caregiver to prove attendance not on school officials, that this requirement had the potential to limit the right to social security of close to 9 million children, and that evidence suggests that school attendance is not likely to be increased by this regulation. The civil society submission called on government to remove the proposed regulation until further debate could take place on the advantages and disadvantages of such a requirement.

### Litigation

More recently, litigation has been instigated by an increasingly frustrated civil society that has concluded that the right to social security, as enshrined in the Constitution, is not being effectively realized by government departments. Such litigation, which has often been supported by strong evidence-based research, resulted in changes to the means test that have led to increased grant applications and the implementation of regulations reducing the document burden on applicants.<sup>i</sup> One Treasury official noted that this litigation has “pushed the boundaries with regard to government’s commitment to chapter 2 of the Constitution.”<sup>iii</sup> The same official, however, cautioned that while litigation has successfully expanded the responsibilities of the state, there has often been no corresponding expansion in the state’s ability to deliver, both in terms of administration and available resources.

### WERE THE CHANGES DUE TO THE CAMPAIGN?

There have been a number of significant expansions of the CSG since it was established in 1998. The grant was introduced at R100 per month, increased again to R110 in July 2001, and was then increased every year at a rate equal to or slightly more than inflation. Because of these increases, budget allocation toward CSGs have



## OUTCOMES RELATED TO THE CAMPAIGN

- **The CSG was introduced in 1998 at R100 per month and is now at R250 per month.**
- **In 1998 children up to seven years old were eligible for the CSG, and now the grant is available to children and youths up to 18 years old.**
- **The number of grant beneficiaries has increased from 1.9 million to over nine million between 2001 and 2009.**
- **Budget allocation for the CSG have increased from R2.4 billion (US \$315 million) in 2001 to R14.4 billion (US \$1.89 billion) in 2008.**

gone from R2.4 billion (US \$315 million) to R14.4 billion (US \$1.89 billion) between 2001 and 2008, and the number of grant beneficiaries increased from 1.9 million in 2001 to over nine million in 2009. Changes in the age cohort have also taken place since 1998, increasing gradually from children under seven years old to a phased-in extension to children and youths up to 18 that began on 1 January 2010. This extension was set to benefit a further two million children at an estimated additional cost of R7.4 billion (US \$970 million) over the three years of phased extension.

While there have clearly been increases and improvements to the CSG, what role did civil society play in achieving these results? The most recent advocacy efforts of civil society regarding the age extension in 2009 have produced some notable changes. An eligibility birth date was chosen which would prevent children falling off the system, and while the government did not drop the school attendance conditionality, school principals must now produce attendance reports for caregivers rather than expecting caregivers to source such reports from schools themselves. In addition, and most important, the failure to produce evidence of attendance does not now result in the suspension of the CSG.

These changes to the extension regulations correspond directly to those recommended in civil society’s submission on the draft regulations, demonstrating further evidence of the effectiveness of civil society research and advocacy. In addition, civil society litigation in relation to the CSG has recently resulted in changes in the grant’s administration and requirements that have extended its reach to more children.

The impact of civil society budget analysis related to the CSG and the research CSOs have undertaken to assess the value of the CSG as a tool to alleviate poverty has been recognized by government officials. Civil society research has not only affected CSG policies but also led to some changes within various government departments involved with the CSG. John Kruger, former Director of Social Services at the Department of Treasury, has noted that in recent years the Treasury has become better at commissioning the “right research,” “asking the right questions,” and “pressing the right research buttons,” partly the result of its interactions with civil society organizations such as the CASE, the Children’s Institute, and IDASA. Selwyn Jehoma, former Director General for Social Security Policy in the Department of Social

Development, acknowledges that the DSD would be poorer in the absence of the research and analysis from civil society.

With regard to the work that provides evidence of the poverty-fighting value of the CSG, civil society actors cite its critical importance when faced with ideological arguments and concerns over costs, calling it the “lifeline of advocacy.” Government officials have also recognized the value of this research. Selwyn Jehoma observes that this evidence-based research was regularly used by the Department of Social Development, while John Kruger notes that it was this research which led to “general support” within the Treasury that the CSG be pushed “as fast as it can be given the finances.” Echoing this last statement, Daniel Plaatjies, former director of Welfare and Social Security in the Treasury, remarks that civil society’s very intense engagement with the CSG has “firmly put on the agenda the needs of children,” which has led to changes in both how the budget is allocated and how government now sees its responsibility toward children.

## CONCLUSION

The changes to the CSG that have been implemented over the years have had a significant impact. Research has shown that the grants target vulnerable groups effectively, improve the ability of caregivers to meet children’s basic needs, and have partly contributed to a fall of over 9 percent in the number of children living in poverty in South Africa. A growing body of evidence also demonstrates that the CSG

improves childhood nutrition, facilitates improved access to schooling, and contributes toward the payment of basic services, such as electricity.

Selwyn Jehoma remarked that civil society had engaged around the CSG with the DSD “thoroughly, and in different guises and with different means, soft and hard, and both extremes have been useful.” He also noted that this engagement had resulted in “irrefutable” evidence that civil society has played a positive role in the development of CSG.

Given the prevailing macroeconomic policy that has been pursued over the last decade, it seems quite remarkable that the CSG has grown to the extent that R30.8 billion (US \$4 billion) is being spent on it in the current financial year. These facts alone clearly demonstrate the success of civil society advocacy in regard to the continuing expansion of the CSG.

The sustained pressure generated by committed CSO coalitions and campaigns played a significant role in the ensuring that this grant grew in both size and number of recipients. Their multifaceted campaign could engage the state on a variety of fronts, depending on the circumstances. The cut and thrust of litigation, supporting research, and media campaigning has kept this important issue moving for more than a decade and shows no sign of flagging.

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<sup>i</sup> The decision on a further court case in relation to extending the grant to those under 18 is pending.

<sup>ii</sup> Chapter 2 is the Bill of Rights which includes the right to social security.

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