

OSISA will endeavor to support –

- Advocacy initiatives that increase citizens' participation in national and sub-national budget planning and public expenditure monitoring, ensuring the prioritisation of resources for education, health and other human development needs.
- Civic and media efforts for public economic literacy.
- NGO initiatives that complement poor capacity of regional governments to negotiate effectively in the multilateral trading system, and with creditor and donor governments for loan and aid terms respectively.
- NGO and social movements advocacy for removing the debt burden on Highly Indebted Poor Countries, and for subsequent sustainable public borrowing and debt management strategies in the countries of the region.
- Initiatives that promote regional human rights and standards in relation to labour and consumer rights.
- Research and accompanying public action on regional integration, trade and industrial development forms that will promote more even human development in all the countries of the region.
- Campaign and advocacy work against corruption in government, and in non-state actors.
- In the different countries, initiatives aimed at strengthening citizens' oversight on local politicians, and their influence on local governance frameworks including service delivery and local government public budgeting and expenditure.

CRITERIA

As an overarching principle, OSISA will support programmes where economic literacy and development awareness are not an end in themselves, but where the emphasis is on *social action for change*. OSISA will not support 'inward looking' economic specialist institutions and individuals, but wide-membership *activist* efforts where the emphasis is on *social action* – mobilizing citizens for change.

In addition, OSISA will support programmes that satisfy the following criteria: -

- (Except in very exceptional circumstances), that the initiative is not limited to a small group of individuals, or an individual, but mobilises a significant cross section of actors through, (in decreasing order of preference) –

- direct wider ownership and stakeholderhood, (that is, the project is actually owned by a wide membership-based organisation, and the members have control over its direction)
 - closely planned participation by different organisations or actors, reinforcing one another to achieve a common goal,
 - initiatives where a project that OSISA is already supporting is complemented or extended.
 - active networking, and other linkages.
- That the project incorporates effective participation of women in the entire project cycle, including that the baseline studies contain, as much as possible, disaggregated information on women and men; that the project design addresses gender related challenges emerging in the baseline; that the implementation teams involve both men and women in equitable roles and responsibilities including leadership; and that monitoring and evaluation indicators are as far as possible disaggregated.
- That, in addition to the above, the project strives to include young people and adults in effective participation and decision making, including through the involvement of young people who are part of progressive youth movements, etc.
- That the implementing organization proposed in the project –
 - is a credible, and committed actor in the area of work in question, as could be suggested from peer reports, donor reviews, previous experience and reputation. Where the organisation is new, OSISA will in place of the above consider the organisation's clarity of vision, contribution of own time, and mobilization of own resources.
 - is demonstrably committed to implementing within its own structures and work patterns, the ideals of open society, including gender equitable staff development and other human resource processes, free exercise by staff of labour rights, etc.
 - has strong accounting mechanisms to its board, wider stakeholders, and public. This could be demonstrated by the publication of annual reports and plans, the keeping of proper and accessible records of financial accounting and inventories, and platforms for stakeholders and related publics to influence strategic direction and priorities.
- That the project reaches rural and other communities that would not have traditionally been included in similar or related projects.

- That the project is innovative in its methodologies, and seeks to maximize impact through creative multiplier effects, rather than one-off events.
- That it articulates or develops ideas on sustainability beyond OSISA support.

AREAS OF SUPPORT

The main content areas of possible OSISA support will include: -

- Projects on **National and local government budgeting and economic planning**. This will mainly focus on organisations that seek to protect and expand social sector expenditure, as well as foster accountability and transparency in public budgeting and economic management.
- Projects on **Trade and investment advocacy**, seeking to campaign for equity and economic justice in the multilateral trading system. Inequities in the global trading system have a direct bearing on retrenchments and other job losses in the region (e.g. from trade liberalization pressures in the multilateral; trading system), on national revenue losses (e.g. from the impact of tariff collection levels), de-industrialisation (e.g. from the destruction of infant industry in economically weaker nations).
- Advocacy initiatives that seek the **Protection of human rights and livelihoods** in the face of increasing recklessness of speculative capital, some rights-diminishing FDI flows, and growing corporate lobbies for unfettered rights for transnational companies, e.g., the pressure from the Organisation for Economic Cooperation and Development (OECD) to introduce the Multilateral Agreement on Investment (MAI) in 1998.
- Participatory research, advocacy, and mobilisation of public action on **Debt**. Debt remains the albatross on the collective neck of the region, and advocacy and public action in this area needs to be supported. Challenges include the odious debt in some countries of the region, debt sustainability under initiatives such as the HIPC, and the need to increase public oversight on official borrowing.
- Research and advocacy for **Regional trade and industrial integration policies and strategies** that seek to reduce uneven geographical development in Southern Africa. Challenges include the scope for protection of livelihoods and industrial

development under the proposed Free Trade Area in SADC; civic concerns on the Trade, Development and Cooperation Agreement between South Africa and the European Union (and its impact on the region), the post-Lome IV framework of Cotonou. With regard to the last, there is need for active regional and national level work in enabling non-state actors to take effective advantage of the stronger civic participation window afforded through Country Support Strategies (CSSs) in the Cotonou Agreement.

- Projects on **Macro-economic policies and globalisation**. Virtually all the nine OSISA countries are undergoing a variety of structural adjustment programmes. The effects of these in accelerating poverty, and even reversing human development gains of early post-colonial years, are now well documented. There is need for NGOs and social movements in the region's countries to, through popular education and public action, campaign against aspects of macro-economic policy that undermine human development in the region.
- Advocacy on **Aid flows**. Aid flows are, in constant dollar terms, decreasing, as social needs such as stem from the HIV/AIDS pandemic increase. Aid flows to deliver on internationally agreed development social benchmarks such as the Organisation for Economic Cooperation and Development DAC (Development Assistance Committee) targets are consistently ignored. There is need for civic articulation of the impact of aid flows as currently structured, between richer countries and the Southern African region.
- Advocacy on **Consumer rights**. There is need to strengthen consumer rights advocacy and monitoring in areas such as access to essential drugs, health and safety standards and with respect to service provision in critical human development sectors such as health and development finance.

WHAT OSISA WILL NOT FUND

- Government economic policy commissions, and other comparable official single-government or multilateral initiatives.
- Welfare needs of identified target groups or individuals, such as loans and grants for shelter construction, drugs for medication, etc.
- Academic research on economic and development policy, where this is not causally and closely linked to social organisation, action and campaigning.

- Credit for business establishment and development.

METHOD OF APPLYING FOR SUPPORT FROM OSISA

- An organization or individual interested in seeking possible support from OSISA will send a preliminary *letter of inquiry* of no more than two pages, outlining the proposer of the project, the scope and purpose of the project, the activities and methodology of the project, linkages with other initiatives, specific expected outputs of the project, as well as a summary of resources being applied for from OSISA.
- If, after reviewing the letter of inquiry, OSISA is of the view that the project has the potential for support from OSISA, OSISA will seek to engage with the proposer of the project on a partnership basis, and this may include mutual discussions to explore what could be the most effective interventions to address the problem and need identified.
- The proposer will then submit a fuller proposal, which will contain, among other things –
 - An explanation of the initiative, including what the problem or need is, and the external environment in which it will be implemented.
 - The intended outputs and outcomes of the project, the broader or long-term impact, and indicators for measuring these.
 - How the programme will be implemented, and the relationship to stakeholders, government, and/or other funders or implementers.
 - Project costs and financing sources.
 - A time frame for the issues and measures taken to ensure sustainability.
 - Issues and risks in the project and how these will be addressed.
 - An indication of the capacity within the organization to implement the project.

Accompanying information to the proposal

The following information should also be included –

- A copy of the organisation's constitution or other governing instruments.
- A description of the organization's goals and objectives.

- A list of the organisation's board members, management, and essential programme staff and membership (categories).
- Most recent annual activity and audited financial report.
- A detailed explanation of how the organization is addressing sustainability issues, as well as a list of current sources of funding.
- Other donors who have been approached to fund the project submitted to OSISA, including the name of the relevant individual at the donor agency, and their contact information.

Guidelines for proposal writing are available on request.

Application documents should be sent to OSISA's office in Johannesburg. Applications are reviewed on an ongoing basis. Although preliminary assessment and interaction regarding a proposal is the responsibility of the Programme Officer, the overall decision lies with the OSISA Board.

For further information contact:

The Economic Reform Assistant Programme Officer

Open Society Initiative for Southern Africa

P O Box 678, Wits 2050

Johannesburg, South Africa.

Telephone: + 27 (11) 403 3414/5/6

Fax: +27 (11) 403 2708

Email: EconomicJustice@osisa.org