

Learning response

Learning response : *Impact evaluation on advocacy for tax justice and OPTI in Belgium*

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1. General

As part of our 2017-2021 DGD Belgium program for Specific Objective 3 on advocacy, we organized an external evaluation to evaluate our advocacy work, in line with the DGD guidelines on evaluations. This evaluation was done according to the OECD-DAC criteria. HIVA-ACE Europe was chosen as the evaluator, as they lead the joint evaluations with 11.11.11; Broederlijk Delen, the climate coalition... They use the methodology developed by Syspons in the context of the climate justice impact evaluation for the learning trajectory organized by the Special Evaluation Service. For each of the evaluations, they conducted about 15 interviews with policymakers. Oxfam participated in 3 evaluations: advocacy work on tax justice, OPTI and climate justice. The evaluation on climate justice will not be ready until September/October 2022 and is therefore not included in this learning response.

We want to use this evaluation primarily to draw lessons for the entire Oxfam Belgique/België advocacy, and hopefully to facilitate exchange in our sector. This information will be supplemented with monitoring data covering all our themes, in order to provide maximum transparency to both our donors and the people we work with. Therefore the outcomes of these two evaluations will be considered along with the future results of the climate evaluation, as well as the evaluation conducted on Oxfam Wereldwinkels' DGD 17-21 program that also contains recommendations on advocacy work, and discussed with all advocacy colleagues as collective lessons learnt.

Oxfam appreciates the quality of the evaluation reports:

- The conclusions are well substantiated
- The evaluators speak with expertise about advocacy
- The evaluators used the monitoring data collected throughout the program.

What could have been better was the planned timing of the evaluations and the reinforcement of our Public Engagement and communication work in the evaluation (although we had not foreseen this in the ToR ourselves).

2. Learning response

RECOMMENDATIONS	Agreement with the recommendation	Further information: follow-up actions and/or explanation	Who is responsible?	Timing
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Tax justice				
<p>Further strengthening the media strategies to play-out its potential impact on the political debate: While it should be confirmed by some further research, the findings of this evaluation point at the importance of investing sufficiently in media performances. This does of course not replace the traditional lobby work but is seen by key informants as an undervalued strategy to weigh on the political debate. Oxfam Solidariteit's presence in the media is reported to help allies to push the tax justice agenda. Further investing in media contacts and developing contributions that have news value, can receive additional attention. This includes reports with rankings and indexes. As a side note, several respondents warn for a framing that is continuously negative as this risks creating a cynical response with the general public. There have been positive breakthroughs internationally and it is important to communicate about them to demonstrate that societal pressure helps to achieve positive outcomes.</p>	Partially agree	<ol style="list-style-type: none"> 1. We can certainly improve on the presence of Oxfam in the media on tax justice, this is a strategic discussion to have with the communication and media team. An important element to discuss in that frame would be to react more proactively to national news (while communication used to target a bit more international tax news). This could be through writing media reactions for example, or seeking more proactively interviews in some cases. We would need to determine what to communicate with coalitions and what we can communicate as Oxfam alone. 2. We have a solid basis to build on as the tax justice advisor works already very closely with communication and media colleagues to strategize and build reactions, in press as well as in social media, towards tax justice news. This collaboration actually increased throughout the programme, notably with the hiring of a media advisor at Oxfam Solidarité. More specific strategizing on tax justice communication also happens at least yearly during the publication of the Oxfam International annual inequality report that typically contains tax recommendations. 3. Some plans are already in the pipeline as the DGD 22-26 program is starting. We are already working on a study specifically focused on Belgium on taxation and climate for the end of the year. We will disseminate the conclusions to the media, and we plan to do so in different increments to maximize the media value. This planning will be done jointly with communication and media colleagues. 4. We are also collaborating on an Oxfam International report on wealth for the end of the year. This will allow us to take Belgium into account in the results and to have specific elements to disseminate at national level, which we know is very sought after by media. 	Tax justice advisor	<p>Ongoing dialogue with communication and media colleagues.</p> <p>Before the end of 2022 for specific products in the pipeline (taxation and climate study, tax on wealth report)</p>

		5. Regarding the framing, it has indeed been sometimes challenging to find the balance between constructive criticism and calling for ambitious reforms. The point of view of Oxfam on the outcomes of recent processes has sometimes been more severe than other stakeholders'. This requires careful consideration in communication.		
Levelling the playing field between business lobbyists and civil society groups: This recommendation is repeated from the baseline. Several respondents indicated that some Cabinets and ministries (FOD/SPF economy) do not have structural engagements with CSOs, while they do open their doors for business sector federations and lobbyists. With the closed nature of the policy making process on taxation issues, certain groups have easier access to policy makers and governmental positions only become public at a late stage. One way to increase the space and timing for policy influencing is by demanding an institutional dialogue on international tax policy development, as is the case in Belgium for climate issues. This does not guarantee more success but at least increases transparency and access to the policy development process. Oxfam could be more assertive and push harder to demand a place at the table in certain parts of the policy cycle.	Agree	<p>This is certainly a challenge that we recognize from our advocacy work.</p> <p>Demanding a more structural engagement for CSOs seems an excellent idea, whether this should translate into an institutional dialogue or another format.</p> <p>This kind of dialogue also exists on the issue of social protection between the CSOs and the Ministry of Development Cooperation, and Oxfam is involved at that level (as well as on climate as the evaluators note).</p> <p>This is a strategy that needs to be discussed beyond Oxfam. And it should include the various civil society actors (NGOs and trade unions) working on international tax issues – which is not a very large group of actors in Belgium. We should also see if a similar structure exists for national tax policy, and whether it makes sense to treat both together.</p> <p>Follow-up actions:</p> <ul style="list-style-type: none"> - Contacting other CSOs on the topic - Check similar mechanisms in the past and on other issues to see what could make more sense 	Tax justice advisor	2022-2023
Nurturing advocacy networks during periods of transition: Building advocacy networks on complex topics such as tax justice takes a lot of time and effort. A network with lobby targets and allies is probably one of the most valuable assets for advocates. The evaluation observed a communication breakdown after the departure of the previous advocacy advisor. Most of the respondents indicated that they were not aware of	Partially agree	<p>We agree that building a network takes a lot of time and effort, and we know that successful networks rely for a large part on personal relationships of trust. This can make handover tricky.</p> <p>As was shared with the evaluators, in early 2021 Oxfam Solidarité went through a period of uncertainty about the place of the fiscal justice advocacy in the organization's strategy. There were 6 months of gap between the departure of the previous tax justice advisor and the hiring of a new advisor.</p>	Tax justice advisor	Decision on monthly newsletter to political contacts: by end of 2022

<p>what happened after the departure and some even doubted whether Oxfam was still working on the topic. Many asked to be contacted more regularly by Oxfam Solidariteit. While it is impossible for a small advocacy unit to maintain the engagement with lobby targets at the original level when there is a gap due to personnel changes, a strategy should be designed to retain some basic level of interactions with the network during the gap. In addition, when the new advocacy advisor starts, a systematic introduction to lobby targets and allies should be considered. More attention should be paid by Oxfam Solidariteit to maintaining these networks during periods of transition.</p>		<p>The head of Policy covered the gap but did not invest in the networks beyond the collaboration with the two main allies, because of time but also not to confuse networks.</p> <p>The previous tax advisor left a solid handover, including complete monitoring data and an overview of contacts, however because of the gap there was no formal introduction of the new advisor to the networks by someone they were familiar with. In addition, the new advisor started at a time when the international tax topics were quite intense. The topics were complex and required a lot of learning before being operational outside the organization. In these conditions, networking inevitably took a back seat and picked up again in early 2022.</p> <p>We can certainly learn from this. The choice of not prioritizing networking relations during the gap might not have been the good one.</p> <p>In addition, one solution might be a monthly newsletter on tax justice sent to our political contacts. This is something that could be taken up temporarily by colleagues in the event of the advocacy advisor's absence (with the support of other tax justice colleagues within the Oxfam confederation), maintain a minimum contact, and could allow a new advocacy advisor to introduce himself or herself to the former advisor's network.</p>		
OPTI				
<p>Continue to look for important international (and EU) events to take combined action with members of parliament (providing input for questions) and media attention. There is a point of attention for the future. The investment of Oxfam Solidariteit in engaging with members of parliament diminished from the second part of 2020 onwards.</p>	<p>Agree</p>	<p>Indeed the engagement with members of parliament diminished after the previous advocacy advisor left. We reached out to them when we organise lobby tours but little outside these moments.</p> <p>We see a commonality here with the recommendation about maintaining (political) networks in the tax justice evaluation, so this is clearly something to consider across advocacy themes.</p> <p>Follow-up action: engage with MPs also outside lobby tours, send them updates and documents (we currently send them mainly to DGD)</p>	<p>OPTI advisor</p>	<p>Ongoing with particular attention outside lobby tours</p>

<p>Re-invest in the engagement with CNCD and 11.11.11. In the past years Oxfam Solidariteit was a very loyal and hardworking ally of CNCD and 11.11.11. and demonstrated its capacity to provide relevant and timely input, for e.g. to push for the concretisation of the differentiation policy at BE level. The humanitarian angle of Oxfam Solidariteit is quite specific and represents a unique voice in the lobby.</p>	<p>Partially agree</p>	<p>We don't necessarily agree that the engagement diminished, in the sense that we always participate in meetings and contribute to joint documents. What diminished, however, is proactive actions to get involved with CNCD-11.11.11 and 11.11.11/ asking to be involved. There have been already two positive examples in the period after the evaluation (2022) : CNCD-11.11.11 and 11.11.11 have been asked to give feedback on the ToR of a research Oxfam is conducting in Palestine, and the current advocacy advisor has proactively asked both umbrella organizations to participate in a meeting with Minister Kitir's cabinet without waiting to be invited.</p> <p>Follow-up action : include more often proactively CNCD-11.11.11 and 11.11.11 in Oxfam advocacy actions when possible.</p>	<p>OPTI advisor</p>	<p>Ongoing</p>
<p>Some politicians might be interested in receiving in a more systematic way very detailed and factual information about effects of the annexation and separation policy on women and girls. The evaluator notices that gender is hardly touched upon in the parliament debate on OPT.</p>	<p>Agree</p>	<p>We do miss information about the impact of annexation and the separation policy on women and girls, and we need to make an effort in this sense. We try to include women as speakers in our lobby tour though (it was the case for the last one and it's the case for the next one).</p> <p>Follow-up action: add elements of analysis on women and girls when reviewing documents, talking points, project proposals, etc...</p>	<p>OPTI advisor</p>	<p>Ongoing</p>
<p>The evaluator tends to support a more activist approach for the Oxfam confederation that is currently under discussion. Given the difficulty to bring the OPTI to the attention of press and general OPTI fatigue, it might be interesting to explore how OPTI could be connected to other topics in order to find unexpected allies. Depending on the outcome of the discussion within the confederation, a closer collaboration between the OPTI advocacy advisor and the campaigners of Oxfam (who are not involved now and prefer it that way given the little manoeuvring space there is in relation to OPTI) might lead to developing alternative pathways that</p>	<p>Agree</p>	<p>We agree that we would need a closer collaboration with Oxfam campaigners. Oxfam Solidarité is very much focused on advocacy to influence policy makers. However, it would be good to see how we could support the Oxfam team in the OPT regarding the set up and support of more Oxfam and other campaigns.</p> <p>We also agree on the idea of connecting with colleagues on other topics to find unexpected allies. Why not discuss Gaza when talking about climate change and link it to the political endeavours the people in Gaza face, for instance? This is something that can be explored.</p>	<p>OPTI advisor</p>	<p>Ongoing</p>

<p>also succeed in mobilising the public (beyond decision makers).</p>		<p>As noted also by the evaluator, unfortunately public campaigning on OPT related issues in Belgium is limited by the red lines imposed by the Oxfam confederation. For instance, a possible field of collaboration that has been identified is business & human rights, a topic on which Oxfam Solidarité is campaigning on at Belgian level. This is linked to the ask for a ban on settlement products put forward by CNCD/11.11.11 and partners, but Oxfam cannot publicly endorse it because it's a red line for Oxfam US and Oxfam Germany.</p> <p>Follow-up actions:</p> <ul style="list-style-type: none"> - inform Oxfam campaigners on advocacy initiatives/activities/asks that have a connection with their work / other topics. - Continue lobbying within the Oxfam confederation to lift the redlines 		
<p>The contact and product tracker is a valuable tool to monitor the policy work. The analysis of the data however might receive more attention. It is possible that over the years, the advocacy topic on OPTI was somehow isolated in Oxfam Solidariteit as it is so specific. This might explain that the evaluator did not find a trace of analysis or discussion on the specific changes (which is said to have been organised twice a year).</p>	<p>Partially agree</p>	<p>Every year an annual plan per team and for the organization is produced and discussed with the team lead. Between 2018-2020 also specific lobby strategies per year were discussed with the policy advisor (not organized in 2021 because of the integration process between Oxfam Solidarité and Oxfam Wereldwinkels). Every year an exchange with the whole organization was organized based on the advocacy data, and specifically between the advocacy advisors to learn together.</p> <p>Within the new organized department a geographical coordination group bringing together the different colleagues working on Palestine at Oxfam Belgique/België (Oxfam Solidarité, Oxfam Wereldwinkels and Oxfam FairTrade) will be organized.</p> <p>Every year as well, one to two exchange meetings will be organized between all advocacy advisors, based on the outcomes harvested and data collected to facilitate mutual learning. The OPTI advisor will be systematically involved. This is part of the MEAL plan designed for the DGD program 22-26.</p>	<p>OPTI advisor</p>	<p>Ongoing with specific outcome harvesting moments</p>

		Follow-up action: organise meetings and share information through the Oxfam internal OPT coordination group and with the other advocacy advisors.		
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