

-- Part A: Mandatory --



**TAX JUSTICE
NETWORK
AFRICA**



OXFAM

Fair Tax Monitor

ADVOCACY & CAMPAIGN PLAN

QUICK REFERENCE TEMPLATE

Quick overview of FTM advocacy steps:

Fill out the grid below to create a quick overview of the advocacy strategy developed *for at least a period of six months* based on the FTM research findings. This is done ideally when the FTM report is about to be finalized and the most important policy asks resulting from the report are becoming clear. The report can then still be tweaked to be directed at the most relevant stakeholders – if necessary. For more comprehensive instructions on how to develop an advocacy and campaign strategy, consult the optional template in part B.

What? (specific policy asks)	Who? (which stakeholders need to be influenced)	How? (through which interventions / activities)	When? (list of opportunities in +/- 6 months after report finalization)	Message(s) (key messages for stakeholders)	Support needed (what can the FTM team help with)

-- Part B: Optional --

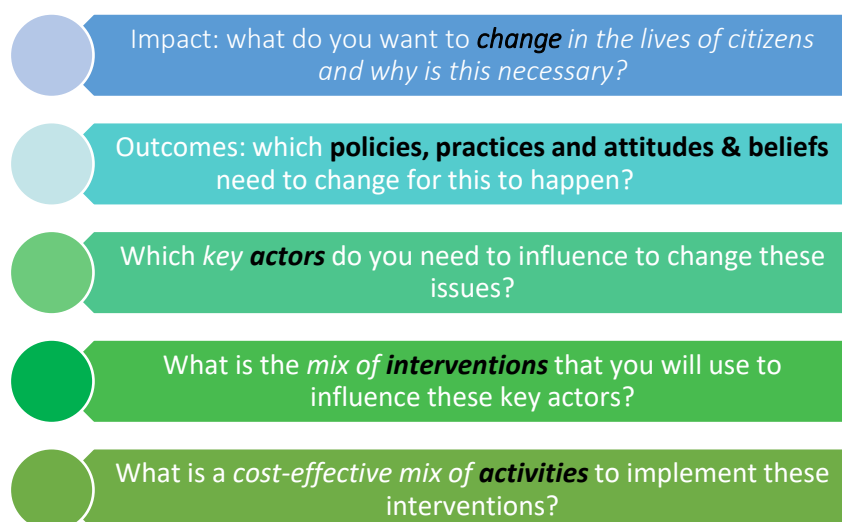


Fair Tax Monitor
ADVOCACY & CAMPAIGN PLAN
FULL TEMPLATE

The following template can be followed as a structural guide for Country Offices (CO) and partner organizations to develop an advocacy strategy based on the findings and recommendations of the national reports of the Fair Tax Monitor (FTM)¹. Since each country will have its own context and specificities around the main causes of inequality and poverty, the template below allows flexibility for COs and partners to develop their own strategy and pursue their main FTM policy recommendations.

- *What* do you want to change (impact & outcomes)?
- *Who* do you need to influence to make these changes happen (selection of key actors)?
- *How* will you influence these key actors (interventions & activities)?

These questions will be answered in five steps:



¹ This FTM advocacy strategy should not be seen in isolation from the broader FAIR-EiU/F4D influencing agenda. If an advocacy strategy for F4D already exists, the steps below only have to be taken if the FTM research concludes with completely new outcomes that are different from the F4D objectives.

The steps below provide more comprehensive instructions on how to develop an advocacy strategy. If your team has not yet gone through some of the steps before, it can be beneficial to fill out the information below. However, this is optional.

Impact

1. Comprehending the national context;

What does the political and economic context look like?	
What are the main topics of the current national debate?	
Upcoming elections (name type of elections, dates and their relevance):	
Recent cases of: budget deficits, tax avoidance, corruption scandals:	
Other:	

2. Key FTM findings;

What are the main findings revealed by the FTM research?	
<u>What is the issue?</u>	<u>Why is this an issue?</u> <i>Where possible explain the effect on inequality and describe what it means for women.</i>
Example. In Uganda, taxes are imposed on the use of social media platforms.	The social media tax restricts free speech by limiting access to the internet and as a regressive tax impacts the poorer segment of society the most.
1.	
2.	
3.	
4.	
5.	

Outcomes

3. Pursued outcomes;

Based on the key findings, **identify the policies, laws, practices and norms, attitudes & beliefs that need to be changed to contribute to the desired changes.** The ultimate question when formulating outcomes is: *what's blocking change?* This can be policies, laws and regulations; practices; and norms, attitudes and beliefs. The outcome must be defined as clear and specific as possible. This can be achieved through the SMART methodology:

- Specific and clear; What exactly should be realized?

- **M**easurable; How will we measure this?
- **A**chievable; Is it feasible? Do we have control/influence over it?
- **R**elevant & recorded; Is this goal recorded and relevant?
- **T**ime-bound; What is a realistic timeline? Short or long-term objective?

It is important to check whether the desired outcomes related to available opportunities are achievable within the time frame and budget of the project. If needed, narrow down the number of desired outcomes based on: impact on lives of citizens, likelihood of success, timeframe and resource constraints, potential allies and supporters, and risk analysis.

What is the issue (see table above):	Desired change in policies, laws, practices and norms, attitudes & beliefs	SMART?
<i>Example</i>	<i>E.g. Contribute to the abolishment of social media tax law by Parliament majority by the end of 20xx (S: abolishment of SocMed tax; M: published by authorities; A: influence – yes, control – no; R: will diminish inequality; T: end of 20xx)</i>	S <input checked="" type="checkbox"/> M <input checked="" type="checkbox"/> A <input checked="" type="checkbox"/> R <input checked="" type="checkbox"/> T <input checked="" type="checkbox"/>
1.		S <input type="checkbox"/> M <input type="checkbox"/> A <input type="checkbox"/> R <input type="checkbox"/> T <input type="checkbox"/>
2.		S <input type="checkbox"/> M <input type="checkbox"/> A <input type="checkbox"/> R <input type="checkbox"/> T <input type="checkbox"/>
3.		S <input type="checkbox"/> M <input type="checkbox"/> A <input type="checkbox"/> R <input type="checkbox"/> T <input type="checkbox"/>

4. Available opportunities;

What are the available opportunities at the present moment? Recognizing important trends, media attention, political initiatives and popular debate around specific events can provide opportunities for measures that would carry support and resonate in other organizations and sectors. The opportunities must be in line with desired political changes that reflect FTM findings.

Examples of opportunities: discussion on finance/budget legislation, reform of national tax legislation or creation/removal of a specific tax, campaigns to increase spending on health & education.

List of key opportunities for influencing in upcoming 12 months	
When?	What?

Key actors

5. Power analysis (selection of key actors);

Identify which key actors need to be influenced to achieve the desired outcomes. Discuss the guiding questions, actor mapping, power analysis and access to actors. A separate actor mapping, power analysis and selection of key actors **has to be carried out for each of the outcomes formulated.**

Start with a *mapping* of all relevant actors involved in the decision making / change process for a specific outcome. Include visible and hidden actors and be as specific as possible.

6. Allies and opposition;

It is necessary to recognize other social actors that are sympathetic to the desired outcomes and identify ways to work with them. Examples of actors are coalitions or national platform on tax justice; recognized academics, business leaders or political movements.

Equally important is to recognize the actors that oppose the desired outcomes (business leaders, political parties, media), understand their arguments, and consider how to neutralize these arguments.

Looking beyond pro (ally) and against (blocker), it is also relevant to identify the stakeholders who are undecided and could be persuaded to support the desired outcomes (swinger).

Desired outcome	Relevant stakeholders	Ally/blocker/swinger

Mix of interventions

7. Mix of interventions;

The goal of this step is to select effective and efficient combinations of interventions to influence the key actors.

Select a specific actor and then consider which combination of interventions is effective and efficient. **Repeat the process for all the key actors to be influenced.**

Be as specific as possible about the interventions. For example:

- Direct engagement: “lobby [to influence key actor] to improve participation of women in decision making”
- Public campaigning: “public campaign mobilizing 50.000 urban youth to support higher budgets for education”
- Coalition building: “build coalition with NGO Y, NGO Z and trade unions”

Develop key messages to influence the specific actors. Messages can differ depending on whom to influence.

Mix of activities

8. Mix of activities;

The goal of this step is to specify cost-effective mixes of activities to implement the interventions that have been selected to influence key actors. There are many activities that can be considered when implementing interventions. Choices should be guided by considerations such as effectiveness, costs, duration, synergies with other activities and external opportunities to exploit.

Interventions	Activities
<i>Example: Direct engagement: lobby to influence parliament to abolish social media laws by 20XX</i>	<i>Example: Meet with members of parliament during event X to discuss findings from FTM research</i>

The FTM reports can be used to enrich ongoing activities within other projects related to tax and spending. FTM reports and related activities are not to be seen in isolation but can be considered an element of a country office's overall strategy. Other tax-related activities can vice versa also be integrated into the FTM advocacy strategy.