1. Program Identification Details

GTF Number 334

Short Title of Program Open Budget Initiative

Name of Lead Institution: International Budget Partnership

Start Date: August 27, 2008

End date: August 26, 2013

Amount of DFID Funding: 3,478,687 pound sterling

Brief Summary of Program: The Open Budget Initiative (OBI) is a five-year program to encourage the adoption of transparent, accountable, and participatory practices in Public Finance Management. The Initiative will engage in 90 countries, primarily in Asia, Africa, and Latin America. It seeks to achieve its objectives by conducting a set of research and advocacy activities which will support the implementation of three biennial Open Budget Surveys measuring government budget transparency practices. The Initiative will also produce literature and guidebooks on public finance management practices and citizens’ budgets. Further, the Initiative will support research and advocacy on the causes and consequences of lack of transparency at the subnational levels of government in select countries and within sectors like the oil and gas sector and in institutions like state-owned enterprises. Finally, the OBI will support the development of international platforms to guide advocacy in support of greater transparency, including developing best practice norms in Public Finance Management.

List of countries where activities have taken or will take place Please review Annex A

List of all implementing partners in each country Please review Annex B

Target groups-wider Beneficiaries The Open Budget Initiative’s (OBI) objective is to promote the adoption by governments of more transparent

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1 Since the grant agreement with DFID was only signed in August 2008, the project began in August 2008 and ends 60 months later in August 2013.
practices in Public Finance Management by
governments; the intended beneficiaries of this program
are the citizens who will benefit from this expanded
transparency. The budget is the government’s
most important economic tool and it affects the lives of
all citizens – but particularly the poor. Expanded
transparency will improve the efficiency of government
service delivery while ensuring that citizens have the
opportunity to influence the expenditures of their funds.
The inclusion of 90 countries in the Open Budget Survey
lays the groundwork for more fine grained research within
individual countries (particularly from the global south) and
across regions. Such research will focus on transparency
in specific sectors and units of government and will assess
the specific factors that promote or inhibit transparency in
government budgeting.

Lead Contact
Vivek Ramkumar
820 First Street NE, Suite 510
Washington DC, 20002
Telephone: 202-408-1080
Email: ramkumar@cbpp.org

2. List of Acronyms

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Full Form</th>
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<tr>
<td>CSO</td>
<td>Civil Society Organization</td>
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<td>DFID</td>
<td>Department for International Development</td>
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<td>GTF</td>
<td>Global Transparency Fund</td>
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<td>IBP</td>
<td>International Budget Partnership</td>
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<td>IMF</td>
<td>International Monetary Fund</td>
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<td>INTOSAI</td>
<td>International Organization of Supreme Audit Institutions</td>
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<td>M&amp;E</td>
<td>Monitoring and Evaluation</td>
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<td>NGO</td>
<td>Non-governmental Organization</td>
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<td>OBI</td>
<td>Open Budget Initiative</td>
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<td>OBS</td>
<td>Open Budget Survey</td>
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<td>OECD</td>
<td>Organization for Economic Cooperation and Development</td>
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<td>PFM</td>
<td>Public Finance Management</td>
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<td>PI</td>
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<tr>
<td>SAI</td>
<td>Supreme Audit Institution</td>
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<td>TOR</td>
<td>Terms of Reference</td>
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3. Executive Summary

Since August 2008, IBP has provided technical assistance to civil society partners in 85 countries to support production of the Open Budget Survey 2008. In order to build a representative sample for research purposes, after the release of the 2006 Survey, the Survey process was expanded to include 26 new countries, providing increased coverage of the Middle East, Francophone Africa, and Asia. Among the new countries covered are several such as Equatorial Guinea, Saudi Arabia, and Sudan that are notable for their lack of transparency. When the OBS 2008 was completed for all countries included in the Survey, IBP compiled and analyzed data from the Survey to produce budget transparency rankings for 85 countries.

IBP created a special new web page (www.openbudgetindex.org) to present the cross-country research findings of the 2008 Open Budget Survey. We also produced targeted dissemination materials such as a Policy Brief Template, Press Release Template, Country Summaries, PDF of the complete Open Budget Survey Report, Advocacy Guide, Key Findings of the Open Budget Survey, Methodology of the Open Budget Survey, wall poster with a map of OBI results, and a postcard that is intended to make the dataset appealing to a broader, more general audience, including students and academic institutions. All materials were produced in Arabic, Chinese, English, French, Portuguese, Russian, and Spanish, and are designed to draw media attention to accountability, transparency, and participation issues. The web pages also contain country “stories” illustrating what civil society groups have been able to accomplish when they have had access to budget information.

After the release of the Open Budget Index 2008, IBP staff presented the findings of the Survey to a variety of audiences, including the World Bank, the Inter-American Development Bank, the National Democratic Institute, the International Consortium on Governmental Financial Managers, the United Kingdom’s Department for International Development, the United States’ Agency for International Development, the United States’ Millennium Challenge Corporation, and a number of universities and academic institutions. IBP staff have also published or submitted for publication a series of articles regarding the OBS 2008 findings in journals published by the International Organization of Supreme Audit Institutions, the Commonwealth Parliamentary Association, the Organization for Economic Cooperation and Development, and the International Consortium on Government Financial Managers.

The 2008 findings of the OBS have encouraged many governments to improve their existing public financial management practices in accordance with international best standards for these practices. For instance, prior to the release of the Survey, Yemen did not publish its Executive’s Budget Proposal or its Year End Report; however, after the OBS 2008 release, Yemen posted the Executive’s Budget Proposal 2007-2009, the Year-end Report 2007, and the budget proposal for local councils and several other related documents on the Ministry of Finance’s website. IBP does not yet have information about which specific communities or groups have been impacted by improvements in government budget transparency practices. However, this question will be explored in the case studies that we plan to compile.

In March 2009, following the release of the 2008 Survey, IBP began contracting with partners to prepare for the conduct of the next round of the Survey, which will be released in 2010.
4. Programme Management

There have been no changes in the management of IBP’s GTF grant since the submission of the IBP’s DFID Inception Report on March 24, 2009.

5. Working with Implementing Partners

Following joint collaboration on the research for the Open Budget Survey 2008, IBP and its civil society partners collaborated to support the release in February 2009 of the Open Budget Survey 2008. IBP provided funding to researchers in all countries covered by the Survey to enable them to hold press conferences or other events to publicize the release of the Survey results to a wide variety of audiences, including government officials, journalists, students, academics, NGOs, embassy officials, and representatives from international financial institutions. IBP also provided support to select partners to enable them to conduct launch activities in eight regions around the world—Central America, South America, Southern Africa, West Africa, East Africa, Middle East and North Africa, South Asia, and Southeast Asia. Further, IBP supported national-level dissemination events in a number of low-scoring countries, including Afghanistan, the Kyrgyz Republic, Sudan, and Yemen.

In March 2009, following the release of the 2008 Survey, IBP began contracting with partners to prepare for the conduct of the next round of the Survey, which will be released in 2010. While there have been no major changes in the Survey process, there have been some small adjustments. For instance, since IBP plans to expand the number of countries included in the next Open Budget Survey from 85 to 90, we have identified new civil society partners in East Timor, Mozambique, Iraq, Senegal, UAE, Mali, Spain, Portugal, and Chile. As would be expected in a project of this scope, there has been some turnover among partners and IBP has identified new partners to continue the Open Budget Survey 2010 in Pakistan, South Korea, and Zambia.

6. Risk Assessment

The Open Budget Survey ranks countries according to their score on a transparency index and receives wide publicity. One foreseeable risk engendered by the Survey is the potentially negative reaction of the national governments of countries that are ranked low on the Survey; in some cases, national governments have acted aggressively toward the OBI’s research partners and have tightened restrictions on the release of information. For example, prior to the release of the 2006 results for China, our China researcher was threatened. In order to protect the researcher, IBP removed the findings for China from the materials that were prepared for publication.

IBP has subsequently taken measures to minimize the exposure of our researchers to government aggression. Before commencing with the Open Budget Survey 2008 research, IBP took note of the risks faced by researchers analyzing such countries as Saudi Arabia, China, and Sudan. IBP discussed with these researchers the potential consequences they could face for working on the Survey. Even though the researcher for Sudan resides in the country, she chose to publicize her identity during the release of the Open Budget Index 2008 results and IBP respected her wishes. On the other hand, the Survey research for China and Saudi Arabia was conducted by researchers who are not resident in those countries. IBP has kept these researchers’ names confidential and the results for these two countries have been published anonymously.
7. M&E Arrangements

There has been no change in the Monitoring and Evaluation arrangements for the Open Budget Survey since the submission of IBP’s DFID Inception Report on March 24, 2009. The management of our M&E effort will take place in a collaborative fashion and all members of the OBI team will be involved in implementing such activities. Below, IBP has designated the specific staff members involved with the oversight of verifiable indicators linked to specific outputs in the Logical Framework (please refer to Inception Report).

**Indicator 1:** The Program Coordinator is responsible for tracking Open Budget Index sub-scores that measure public access to budget information in 90 countries.

**Indicator 2 (a):** The Program Manager is in charge of ensuring that international standards and potential norms are introduced, debated, and adopted in the appropriate international fora.

**Indicators 2 (b) (c):** The Program Officer is responsible for tracking the number of governments that publish Citizens Budgets and convene public hearings on the budget.

**Indicators 3 (a) (b):** The Program Manager is in charge of the production and distribution of the Public Finance Management Guide and the Citizens Budget Guide.

**Indicators 3 (c) (d):** The Senior Analyst oversees the documentation of case studies intended to detail the impact of transparency on the management of specific sectors (e.g. extractive industries, security, and health). The Senior Analyst will also use case studies to document barriers to transparency in Public Finance Management as well as the methods by which these barriers can be overcome or eliminated.

**Indicator 4:** The Senior Analyst oversees the production of case studies documenting examples of public participation in budgeting that reduce wasteful/inefficient expenditures in a selected set of countries.

**Indicators 5 (a) (c):** The Program Manager is responsible for establishing an international platform and overseeing the grants issued to support country advocacy strategies.

**Indicator 5 (b):** The Senior Analyst documents instances of collaboration among CSOs undertaking joint advocacy initiatives.

8. Logframe Changes

There have been no changes in IBP’s Logical Framework since the submission of IBP’s DFID Inception Report on March 24, 2009.

9. Emerging Impact on Governance and Transparency

The release of the Open Budget Survey 2008 results elicited positive responses from a number of national governments and CSOs.

After the launch of the Open Budget Index in Washington DC and various regions, a number of civil society organizations based in countries not covered in the Survey (such as Italy, Israel, Canada, and Singapore) asking that their countries be assessed in the next Survey. These civil
society researchers wanted to use the Open Budget Survey to monitor whether their respective governments adhere to international best practices in public finance management. Their desire to participate in the Open Budget Survey reflects the Survey’s role in nurturing demand for accountability and responsiveness from governments.

Following the release of the Survey, several governments expanded the transparency of their budgeting practices. For instance, prior to the release of the Survey, Yemen did not publish its Executive’s Budget Proposal or its Year End Report; however, after the OBS 2008 release, Yemen posted the Executive's Budget Proposal 2007-2009, the Year-end Report 2007, and the budget proposal for local councils and several other related documents on the Ministry of Finance’s website.

The government of Rwanda is engaged in a discussion with the IBP about its OBI 2008 score of zero out of a possible 100. The government is concerned that because the research was undertaken in 2007, the Open Budget Survey 2008 results do not reflect Rwanda’s recent implementation of procedures that increase its transparency, including the posting of budget information on the government’s website that was not previously released to the public.

After reviewing the results of the Open Budget Survey 2008, the government of Afghanistan responded that its national budget is highly dependent on foreign aid, which can be unpredictable. Thus, the Afghan government stated it is difficult for it to finalize consolidated budget documents, including the Executive’s Budget Proposal, far enough in advance to allow the legislature sufficient time to review them. Despite these difficulties, the Afghan government stated that it is interested in working to improve budget transparency in the country.

The New Zealand Treasury informed the Open Budget Survey researcher that partially owing to the findings and recommendations of the Open Budget Survey, they are undertaking work to expand information regarding tax expenditures and that the Auditor General has recently issued a new report intended to track the government’s follow-up on audit recommendations.

Namibia’s Ministry of Finance argued that the Survey neglected to highlight that “Namibia already scores nearly double the average of its Sub-Saharan African neighbours.” The Institute for Public Policy Research, the organization that conducted the Survey research in Namibia, is involved in a dialogue with the Ministry of Finance to discuss ways in which Namibia’s budget transparency score can be improved in the 2010 round of the Open Budget Survey.

In Brazil, the President’s office contacted its Internal Audit Office and enquired about the Survey results for Brazil. A member of the Audit Office then contacted the IBP and discussed with us Brazil’s budget transparency ranking and possibilities for improving its score. The Audit Office expressed particular interest in producing a Citizens Budget and in strengthening oversight institutions, especially at the local level.

The government reactions listed above demonstrate the Open Budget Initiative’s impact on promoting government accountability and responsiveness.

What has changed? The 2008 findings of the OBS have encouraged many governments to improve their existing public financial management practices in accordance with international best standards for these practices.
How has it changed? As discussed above, dissemination of Survey findings has encouraged several governments to review their practices in order to identify possible ways of improving their scores or even to begin making internal documents available to the public.

Why has this change occurred? When change occurs on the basis of the Survey results, it is likely because governments are sensitive to comparisons with other countries on a global basis and particularly on a regional basis. Importantly, the OBI rankings provide specific benchmarks against which performance can be measured – and highlight specific actions that can be taken to improve a government’s score.

Who has been impacted by this change? IBP does not yet have information about which specific communities or groups have been impacted by these changes. This question will be explored in the case studies that we plan to compile.

10. Cross-cutting Issues

Not Applicable

11. Progress towards Sustainability (year 2 onwards)

Not Applicable. Building from a pilot project conducted in 2004, the Open Budget Survey has proven to be a sustainable project and has already been repeated successfully in 2006 and 2008 (and each iteration has included an expanded number of countries).

12. Innovation

Over the next three to five years, IBP will focus on building highly skilled, sustainable civil society budget organizations and on expanding cohesive, multi-stakeholder national networks capable of promoting budget transparency and accountability. The IBP believes that a focus on these outcomes over the next 3-5 years will contribute to a transformation of the environment within which government policy makers take decisions and implement reforms. The IBP focus on short-term outcomes will support the development within civil society budget organizations of the skills, financial resources, and information necessary to shape policy debates around government transparency, accountability and service delivery. The advocacy of these civil society budget organizations will be amplified if they are part of larger, multi-stakeholder networks and have access to high-quality policy research and analysis as well as timely, accurate, comparative information about government budget transparency. In turn, work at the national level will be reinforced by parallel efforts to change the terms of the debate about government transparency at the international level and to create an environment that supports expanded transparency and provides a larger role for civil society participation in public finance management.

In pursuit of these short-term outcomes, the IBP implements two major initiatives: the Partnership Initiative (PI) and the Open Budget Initiative (OBI). At the core of the PI is an effort to achieve reforms in various phases of the public budget cycle that range, depending on the country context, from planning to budgeting and on to service delivery and the audit of government accounts, through partnership with strong, sustainable civil society budget organizations that are embedded in broader civil society coalitions in approximately 15 countries in the Global South. The PI implements a multi-stakeholder, in-depth strategy in a limited number of countries. As the initiative develops, the PI will support research and advocacy that is more comparative and international and that builds on the lessons drawn from its work. The
OBI complements this country-specific PI work with a broader program of research, comparative analysis, and advocacy organized around its Open Budget Survey. OBI advocacy, carried out with a broad network of analysts and civil society actors in more than 85 countries, demands greater budget transparency and public participation. Both initiatives are assisted by the training and communications initiatives managed by the IBP.

Activities carried out by both Initiatives include grant making to support the work of IBP partner organizations; training and technical assistance to increase the number of civil society budget analysts and the capacity of partner organizations; research to document the positive impact of civil society participation in each of the phases of the budget cycle, the barriers to greater government transparency and accountability, and the gains that may be achieved through budget reforms; electronic and print communications to convey the lessons and findings of this work to broader audiences; network building to share lessons among partners and support the replication of innovative programs; and finally, advocacy to promote reforms at the international, national, and sub-national levels.

Within each of these broad Initiatives – PI and OBI – a variety of IBP services is provided and IBP partners carry out their own parallel programs of action. Collectively, these contribute to the development of stronger organizations and the creation of networks that engage with citizens to produce more sophisticated and powerful advocacy campaigns targeted at policy makers with the authority to implement reforms in budget policies, processes, rules and regulations, and institutions.

13. Learning from GTF

We expect to have more to report regarding lessons from the Open Budget Survey program once a suitable period has elapsed to implement the program activities.
# ANNEX A: LIST OF OPEN BUDGET INITIATIVE 2010 COUNTRIES

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<thead>
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<th>Country</th>
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<td>Afghanistan</td>
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<tr>
<td>Dominican Republic</td>
<td>Macedonia</td>
<td>Rwanda</td>
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</tbody>
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ANNEX B: LIST OF OBI IMPLEMENTING PARTNERS IN EACH COUNTRY

Afghanistan
Ahmad Wali Qaderi & Lorenzo Delegues
Integrity Watch Afghanistan
Ansari Road, Kutche-Blossom
Shahr-e-Now, Kabul, Afghanistan
Tel: +93 797 105 906
Email:
Ahmad: ahm_wali@hotmail.com
Lorenzo: lorenzociao@gmail.com

Albania
Zana Vokopola
Urban Research Institute
Bulevardi Bajram Curri, pallati 23
Ap. 7, Tirana, Albania
Tel: +355 4256840
Email: zvokopola@uri.org.al
Website: www.uri.org.al

Algeria
Mohammed Z. Barka
Association de Finances Publques (AFP)
29, rue Bataille Filaoussène
Tlemcen 13000 Algeria
Tel: +213 71 78 68 07
Email: zbarka@fulbrightweb.org

Angola
Ernesto Kambali
Comissao Episcopal de Justica e Paz da CEAST
PO Box 2918. Luanda /Angola
Tel: +244 21 78 68 07
Email: coordenador.sje@gmail.com

Argentina
Luciana Díaz Frers & Gabriel Filc
Centro de Implementacion de Politicas Publicas para la Equidad y el Crecimiento (CIPPEC)
Foundation
Argentina. C1022AAA
Tel:+54-11-4384-9009
Email:
Luciana: ldiazfrers@cippec.org
Gabriel: gfilc@cippec.org
Website: www.cippec.org

Azerbaijan
Kenan Aslanli
Public Finance Monitoring Center (PFMC)
44, J. Jabbarly str., 9th floor, Caspian Plaza 3.
Baku AZ1065, Azerbaijan
Tel: +994 12 497 8967
Fax: +994 12 497 8967
Email: kenan@pfmc.az
Website: http://www.pfmc.az

Bangladesh
Mohammed Abu Eusuf
University of Dhaka
Department of Development Studies, University of Dhaka
Dhaka – 1000, Bangladesh
Tel: +880-1711287444
Email: eusuf101@yahoo.com
Website: www.devstud-udhaka.ac.bd

Bolivia
Javier Gómez Aguilar & Juan Luis Espada Vedia
Centro de Estudios para el Desarrollo Laboral y Agrario (CEDLA)
La Paz. 8630, Bolivia
Tel: +(591) 02 2413175
Email:
Javier: jgomez@cedla.org
Juan: jlespada@cedla.org
Website: www.cedla.org

Bosnia Herzegovina
Omer Car & Faruk Hujic
Inicijativa za ekonomski razvoj BiH – INER BiH
Hamdije Cemerlica 2/9,
71000 Sarajevo, Bosnia and Herzegovina
Tel:
Omer: +387 (0)61 571 713
Faruk: +387 (0)61 210 882
Email:
Omer: car_omer@yahoo.com
Faruk: faruk_hujic@hotmail.com

Botswana
Jonathan Mayuyuka KAUNDA
Botswana Institute for Development Policy Analysis (BIDPA)
BIDPA House.134 International Finance Park
Kgale Hill Private Bag BR 29
Gaborone, Botswana
Tel: +267 397 1550
Email: kaundajm@bidpa.bw
Website: www.bidpa.bw
Brazil
Luciano Cerqueira
Brazilian Institute of Social and Economic Analyses
Av. Rio Branco 124, 8.andar
Rio de Janeiro
Tel: +55 21789431
Email: lcerqueira@ibase.br
Website: www.ibase.br

Bulgaria
Latchezar Bogdanov
Industry Watch Group
65 Shipchenski Prohod Blvd.
Sofia 1574 Bulgaria
Tel: +359 899209752
Email: Bogdanov@iwathcbulgaria.com
Website: www.iwatchbulgaria.com

Georgi Angelov
Open Society Institute, Sofia
56, Solunska St.
1000, Sofia, Bulgaria
Tel: +359 2 930 66 52
E-mail: george@osi.bg
Website: www.osi.bg

Burkina Faso
SILWE Kaphalo Segorbah
Center for Democratic Governance (CGD)
CGD s/c PNUD Cité Azimmo. 01 BP 575
Ouagadougou 01 Burkina Faso
Tel: +226- 76 68 21 84
Email: segorbah@yahoo.fr
Website: www.cgd.bf

Cambodia
OU Sivhuoch & GIJS Koop
NGO Forum on Cambodia
#9-10, St. 476, Toul Tompoung 1
P.O. Box 2295
Phnom Penh 3, Cambodia
Tel: +(855) 23 214 429
Email: OU: Sivhuoch@ngoforum.org.kh
GIJS: koop@ngoforum.org.kh
Website: http://www.ngoforum.org.kh/

Cameroon
Léonard Eoussa
Coordonnateur de l’ONISC
Code postal (237), Boîte postale 11 807
Ville : Yaoundé, Province : Centre, Cameroun
Tel : + (237) 22 06 42 78
Email : onisc.infos@gmail.com

China
Please contact for inquiries:
The Open Budget Initiative
International Budget Partnership
The Center on Budget and Policy Priorities
800 First St NE
Washington, DC 20002
Tel: 202-408-1080
Fax: 202-408-8173
Email: info@internationalbudget.org
Website: www.internationalbudget.org

Colombia
Gory Suarez & Giovannni Cano Bedoya
FORO JOVEN
Carrera 27 no. 47 a 55 Bogota Colombia
Tel:
Gory: +57 312 481 5854
Giovanni: +57 312 828 0593
Email:
Gory: gorysuarez@gmail.com
Giovanni: giovanni.cano@gmail.com

Costa Rica
Ronald Alfaro Redondo
Programa Estado de la Nación
Código Postal 1174-1200 Pavas. San José, Costa Rica
Tel: +506 2290 7222
Email: ralfaro@estadonacion.or.cr
Website: www.estadonacion.or.cr

Croatia
Ivica Urban
Institute of Public Finance
Katančićeva 5, 10000 Zagreb, Croatia
Tel: +385 1 488 6444
Email: ivica@ijf.hr
Website: www.ijf.hr

Czech Republic
Lucie Sedmihradská
University of Economics, Prague
University of Economics nám. W Churchilla 4
130 67. Praha 3 Czech Republic
Tel: +420 224 095 108
Email: sedmih@vse.cz
Website: http://www.vse.cz/

Democratic Republic of Congo
Abraham DJAMBA SAMBA wa SHAKO
Coordonnateur National
Réseau des Organisations Partenaires de l’IFES (ROPI)
4, Bokasa, Imm. Massamba, 1er Niveau, Local 75,
Gombe, Kinshasa
Tel: +243 998 23 79 62
Email: ropicn@yahoo.fr

Dominican Republic
Juan Castillo
Fundacion Solidaridad
Avenida Francia #40, Santiago, República Dominicana
Tel: +809 971 5400
Email: fsolidaridad@gmail.com
Website: solidaridad.org.do

East Timor
Christopher Henry Samson
Lalenok Ba Ema Hotu (LABEH)
No 30 De Agosto Depan SDN 07 Malinamok, Comoro, Dili Timor-Leste
Tel: +6707240795
Email: labeh2003@yahoo.com
Website: www.labeh.org

Ecuador
Humberto Dirani
Transparencia Ecuador
La Rábida N26-32
Quito, Ecuador
Tel: 593 22 529 008
593 22 555 191
Email: hidirani@transparenciaecuador.org
Website: www.iaebeh.org

Egypt
Lobna Mohamed Abdellatif
Partners in Development
8 El Sad ElAli st, Vinni sq. Dokki, Giza.12311, Egypt
Tel: +2 01016949494
Email: lobnama@aucegypt.edu

El Salvador
Jaime López
Asociación Probidad/FESPAD
25 C. Pte. No. 1332 Edif. Fespad, Col Layco, San Salvador
Tel: +503 2236-1800
Email: jai.lopez@yahoo.com
Website: http://probidad.org
http://fespad.org.sy

Equatorial Guinea
Tutu Alicante León
EG Justice
652 Garcia St. Santa Fe, NM 87505
Tel: +615 479-0207
Email: tutu@egjustice.org
Website: www.egjustice.org

Fiji
Zena Sherani
Transparency International (Fiji) Limited
72 Pratt Street
GPO Box 12642
SUVA, Fiji
Tel: +679 331 3988
Email: programmeofficer@transparencyfiji.org
Website: www.transparencyfiji.org

France
Michel Bouvier
Groupement Européen de Recherches en Finances Publiques
GERFIP. Université Paris I Sorbonne, 12 Place du Panthéon. 75005 Paris. France
Tel: +331 440 77 689
Email: maupertuis284@gmail.com
Website: www.gerfip.org

Georgia
Tamuna Karosanidze
Transparency International Georgia
26 Rustaveli Ave., Tbilisi, Georgia 0108
Tel: +995 32 92 14 03
Email: Tamuna@transparency.ge
Website: www.transparency.ge

Germany
Dr. Michael Thöne
FiFo Institute for Public Economics, University of Cologne
Postfach 420 520 D-50899 KOELN. Germany
Tel: +49 221 426 979
Email: thoene@fifo-koeln.de
Website: www.fifo-koeln.de

Ghana
Nicholas Adampk
Centre for Budget Advocacy (CBA) of the Integrated Social Development Centre (ISODEC)
P. O. Box MP 2989, Mamprobi, Accra, Ghana
Tel: 233-(0)21-254918/254921
Email: NAdampk@isodec.org.gh
Website: www.isodec.org.gh

Guatemala
Jorge Santos & Jorge Arturo
Centro Internacional para Investigaciones en Derechos Humanos (CIIDH)
2 Calle 4-42, Zona 2
Guatemala Ciudad, Guatemala
Tel: +502 225 16146
Email: cidh@yahoo.com
Website: www.cidh.org

**Honduras**
José Javier Acevedo Bustillo
Centro de Investigación y Promoción de los Derechos Humanos CIPRODEH
Apartado Postal 2235. Tegucigalpa M.D.C. Honduras, C.A.
Tel: +504 232 5818
Email: ciprodeh@cablecolor.hn

**India**
Yamini Mishra
Centre For Budget and Governance Accountability, (CBGA)
A-11, Second Floor, Nitibagh, New Delhi-110049
Tel: +26 537 603
Email: Yamini.mishra@gmail.com
Website: www.cbgaindia.org

**Indonesia**
Riyan Sumindar
Bandung Institute of Governance Studies (BIGS)
Jl. Kidang Pananjung No. 5C Bandung 40132
Jawa Barat Indonesia
Tel: 62-22-2501954
Email: rsumindar@bdg.centrin.net.id
Website: www.bigs.or.id

**Iraq**
Dr. Kamal Field Al-Basri
Iraq Institute for Economic Reform
Tel: 0044 7931 606360
Email: kamal@field.net

**Italy**
Paolo de Renzio
Centre for Aid and Public Expenditure
Overseas Development Institute
111 Westminster Bridge Road
London SE1 7JD
UK
Tel: +44 (0)7810 361682
Email: p.derenzio@odi.org.uk
Website: http://www.odi.org.uk

**Jordan**
Ibrahim H. Saif
Center for Strategic Studies (University of Jordan)
Queen Rania Street. PO. Box 13068. Post Code 11942, Center for Strategic Studies (University of Jordan), Amman-Jordan
Tel: ++962-6-5300100

Email: i.saif@css-jordan.org
Website: www.css-jordan.org

**Kazakhstan**
Janar Jandosova
Research Centre Sange (Civic Foundation)
Address:
Janar: Kabanbai batyr 7, office 75, Astana, Kazakhstan,
Fatima: Shevchenko 5, 5, 050100, Almaty, Kazakhstan
Tel: +7 317 2 24 12 88
Email: janar.sange@gmail.com
Website: www.sange.kz

**Kenya**
John Mutua
Institute of Economic Affairs
P 5th Floor, Block D, ACK Garden House
P.O.BOX 53989 00200 Nairobi, Kenya
Tel: (+254-20) 2717402
Email: mutua@ieakenya.or.ke
Website: http://www.ieakenya.or.ke/

**Kyrgyz Republic**
Nurbek Toktakunov
Independent Human Rights Group Public Foundation
146 A Ibraimova Street, apartment #31, Bishkek, Kyrgyzstan 720011
Tel: +996 312 62 81 45
Email: ihrg2003@gmail.com

**Lebanon**
Khalil Gebara & Gaelle Kibranian
The Lebanese Transparency Association (LTA),
PO Box 50-552, Baabda, Lebanon
Tel: +961-1-388113 or +961-1-388114 or +961-1-388115
Email: Khalil: kgebara@transparency-lebanon.org
Gaelle: gkibranian@transparency-lebanon.org
Website: www.transparency-lebanon.org

**Liberia**
J. Aloysius Toe & Jasper Cummeh III
Foundation for Human Rights and Democracy (FOHRD) in collaboration with Actions for Genuine Democratic Alternatives
J. Aloysius: Congo Town, Tubman Boulevard, Sinkor A. G. Road. Corner of Carey/Macdonald Streets, Monrovia, Liberia
Tel: Aloysius: +231 66 6 88 19
Jasper: +231 7 7855-147
Email: Aloysius: aloysiustoe@yahoo.com
Jasper: jasper_cummeh@freeagenda.org
Website: www.fohrd.org
www.freeagenda.org

Macedonia
Marija Risteska & Zhidas Daskalovski
Centre for Research and Policy Making
Blvd. AVNOJ br.42-1-5, 1000 Skopje, Macedonia
Tel: Marija: +38 970 533 992
Zhidas: +38 970 231 949
Email: Marija: risteska@crpm.org.mk
Zhidas: daskalovski@crpm.org.mk
Website: www.crpm.org.mk

Malawi
Benedicto Kondowe
Coordinator
Civil Society Coalition for Quality Basic Education
Hotel Africanna Premises, Opposite JICA,
P.O. Box 30736, Lilongwe, Malawi
Tel: + 265 1 770 229/172
Email: cscqbe@sdnp.org.mw
Website: www.cscqbe.org

Malaysia
Khairiah Makata and Noel Dass
Centre for Public Policy Studies, Asian Strategy & Leadership Institute
1718, Jalan Ledang, Off Jalan Duta, 50480
Kuala Lumpur, Malaysia
Tel: +603 20935 393
Email: Khairiah: khairiah@cpps.org.my
Noel: noel@cpps.org.my
Website: www.cpps.org.my

Mexico
Diego de la Mora & José M. Martín
Fundar, Centro de Análisis e Investigación, A.C.
Mexico, D.F., Mexico
Tel: +52 55 5554 3001 ext. 113
Fax: +52 55 5554 3001 ext 140
Email: Diego: diego@fundar.org.mx
Jose: jose@fundar.org.mx
Website: www.fundar.org.mx

Mongolia
Dorjdari Namkhajantsan
Open Society Forum (Foundation) Mongolia
Jamyan Gun Street-5/1, Sukhbaatar District, Ulaanbaatar-48, Mongolia
Tel: +976-11313207
Email: dorjdari@forum.mn
Website: www.forum.mn

Morocco
Azeddine Akesbi
Transparency Maroc
24 Bd de Khouribga Casablanca 20 000, Maroc
Tel: 212 631496
Email: azakesbi@menara.ma
Website: www.Transparencymaroc.org

Mohamed Boussetta
Université de Rabat
Tel: 212 061969460
Email: mboussetta@menara.ma

Namibia
Graham Hopwood
Institute for Public Policy Research
Box 6566 Ausspannplatz, Windhoek Namibia
Tel: +26 461 240 514
Email: director@ippr.org.na
Website: www.ippr.org.na

Robin Sherbourne
Namibian Economics
P.O. Box 86058
Windhoek, Namibia
Tel: +264 61 250848
Email: robin@namibianeconomics.com

Nepal
Satyendra Timilsina
The Strategic Group
Kha 10/28, Kopundole, Lalitpur, Nepal
Tel: +98 510 05 735
Email: stimilsina@gmail.com

New Zealand
Murray Petrie
Transparency International (New Zealand)
34 Harbour View Rd, Northland, Wellington
6012, New Zealand
Tel: +64 447 561 09
Email: mpetrie@ihug.co.nz
Website: www.esg.co.nz
Nicaragua
Ana Quirós Víquez
Centro De Informacion y Servicios De Asesoria En Salud (CISAS)
Tel: +505 268 5969
Email: ana@cisas.org.ni
Website: www.cisas.org.ni

Niger
Moussa Tchangari & Ousmane Abdourahamane
Alternative Espaces Citoyens
72 rue Ci 47 Cite Poudriere, BP: 10948 Niamey, Republique du Niger
Tel: +227 207 42439
Email: Moussa: tchangari@alternative.net
Ousmane: abdousmane@cooperation.net
Website: www.alternative.ne

Nigeria
Oby Nwankwo & Ralph Ndigwe
Civil Resource Development and Documentation Centre (CIRDDOC)
Fourth Dimension Complex, 16 Fifth Avenue, City Layout Enugu, Enugu State Nigeria 400001
Tel: +234 42 320 559
Oby: +234 42 303 315
Ralph: +234 80 5281 1250
Email: Oby: cirddoc96@yahoo.com
Ralph: rndigwe@yahoo.com
Website: www.cirddoc.org

Norway
Jan Isaksen
Chr. Michelsen Institute
PO Box 6033, N-5892 Bergen, Norway
Tel: +4755574163
Email: Jan.isaksen@cmi.no
Website: www.cmi.no

Pakistan
Rafia Ghaus & Nadeem Ahmad
Social Policy & Development Centre
15, Maqbool Cooperative Housing Society Block 7/8, Karachi, Pakistan.
Tel: +9221 111 113 113
Email: Rafia: rafiaghaus@spdc.org.pk
Nadeem: nadeem@spdc-pak.com
Website: www.spdc.org.pk

Papua New Guinea
Paul Barker
Institute of National Affairs

P. O. Box 1530, Port Moresby, NCD, Papua New Guinea
Tel: 675-3211044
Email: inapng@daltron.com.pg
Website: www.inapng.com

Peru
Caroline Gibu
CAD Ciudadanos al Dia
Tel: 51-1-4402787
Email: cgibu@ciudadanosaldia.org
Website: www.ciudadanosaldia.org

Philippines
Malou Mangahas
Philippine Center for Investigative Journalism (PCIJ)
3/F Criselda II Bldg., 107 Scout de Guia St., 1104 Quezon City, Philippines
Tel: +632 410 4768 to 69
Email: mcmangahas@pcij.org

Poland
Wojciech Misiąg
Gdańsk Institute for Market Economics
Instytut Badań nad Gospodarką Rynkową, Kołobrzeska 16, 02-923 Warszawa, Poland
Tel: +48 22 651 8660
Email: misiag@aster.pl
Website: www.ibngr.edu.pl

Romania
Afrodita Popa
A&A Expert Advice
Calea Victoriei 85, Bl.1, ap.30, sect.1. Bucharest. Romania
Email: afrodita_popa@yahoo.com

Russia
Tatiana Vinogradova
St.Petersburg Humanities and Political Studies Center
7th Krasnoarmeyskaya 25/14 190005 St.Petersburg Russia
Tel: +7 812 712 66 12
Email: t9095115@yandex.ru
Website: www.strategy-spb.ru

Rwanda
Safari Emmanuel
CLADHO (Collectif des Ligues et Associations de Defense des Droits de l’Homme au Rwanda)
B.P. 3060 Kigali
Tel: +250 084 880 22
Email: cladho@rwanda1.com

**Saudi Arabia**
Please contact for inquiries related to Saudi Arabia:
The Open Budget Initiative
The International Budget Partnership
The Center on Budget and Policy Priorities
800 First St NE
Washington, DC 20002
Tel: 202-408-1080
Fax: 202-408-8173
Email: info@internationalbudget.org
Website: www.internationalbudget.org

**São Tomé e Príncipe**
Carla Sardinha Vieira & Kiluange Ntoku
Noronha Tiny
WEBETO.ORG
Cidade de São Tomé C.P. nº 930
S. Tomé and Príncipe

Lisbon Office:
Edif Castelo Norte, Porta B – Portas de Benfica
Freguesia de S. Domingos de Benfica
1500 – 469 Lisboa
Tel:
Carla Sardinha Vieira: +351 965 055 006
Kiluange: +351 964 407 448
Email:
Carla Sardinha Vieira: csardinhavieira@sapo.pt
Kiluange: tiny@juristep.com

**Serbia**
Nemanja Nenadić
Transparency - Serbia
11000 Belgrade. Bulevar Despota Stefana 36/l.
Republic of Serbia
Tel: +381 11322 81 96
Email: nemanjalaw@sezampro.yu
Website: www.transparentnost.org.yu

**Slovenia**
Mitja Čok
University of Ljubljana, Faculty of Economics
Kardeljeva pl. 17, 1000 Ljubljana, Slovenia
Tel: +386 1 5892 741
Email: mitja.cok@ef.uni-lj.si
Website: www.ef.uni-lj.si

**South Africa**
Russell Wildeman
Economic Governance Programme
IDASA

Physical Address: Kutlwanoong Democracy Centre, 357 Visagie Street (corner Prinsloo).
Pretoria South Africa
Postal address: PO Box 56950, Arcadia, 0007, South Africa
Tel:
Idasa: +27 12 392 0500
Russell: +27 12 392 0546
Email: rwildeman@idasa.org.za
Website: http://www.idasa.org

**South Korea**
Si Kyung Seong
People's Institute of Economic & Social Studies
Address: 108-201 Park Town Sunae-Dong Seongnam- Si GeonhGGi-Do, South Korea
Tel: +82 19 242 5244
Email: skseong0321@naver.com

**Sri Lanka**
B G Sriyanie Kanthimathie Dias Wijesundara
Center for Policy Alternatives
24/2, 28th Lane, Off Flower Road Colombo 07.
SriLanka. 00700
Tel: +94 011564404
Email: sriyanie@cpalanka.org
Website: www.cpalanka.org

**Sudan**
Dr. Buthaina Ahmed Elnaiem
Juba University
Khartoum North, P.O. Box 98, Sudan
Tel: +249 9 112 402 42
Email: belnaiem@yahoo.com

**Sweden**
Anna Schnell
Melander Schnell Consultants
Liljegatan 12. 753 24
Uppsala, Sweden
Tel: +46 706 990 475
Email: aschnell@msc.st
Website: www.msc.st

**Tanzania**
Elizabeth Missokia
HakiElimu
739 Mathuradas Rd.PO Box 79401. Dar es Salaam, Tanzania
Tel: 255 22 215 1852
Email:
PAA: paa@hakielimu.org
HakE: emissokia@hakielimu.org
Website: www.hakielimu.org
Thailand
Ora-orn Poocharoen
Lee Kuan Yew School of Public Policy,
National University of Singapore
469C Bukit Timah Road, Oei Tiong Ham,
Singapore 259772
Tel: +65 6516 2541
Email: spppo@nus.edu.sg
Website: www.lkyspp.nus.edu.sg

Trinidad and Tobago
Dennis A. Pantin
Sustainable Economic Development Unit for
Small & Island Economies. University of the
West Indies.
St. Augustine Campus. Trinidad & Tobago.
Tel: +86 8662 6555
Email: dpantin@fss.uwi.tt
Website: http://sta.uwi.edu/sedu

Turkey
Ahmet Buldam & Ethem Yenigün
Turkish Economic and Social Studies
Foundation
Bankalar Cad. Minerva Han. No:2, Kat: 3
Karakoy-Istanbul-Turkey-34420
Tel: +90 212 292 89 03
Ahmet: ahmetb@tesev.org.tr
Ethem: eyenigun@tesev.org.tr
Website: www.tesev.org.tr

Uganda
Patrick Tumwebaze & Imelda Namagga
Uganda Debt Network (UDN)
Plot 424 Mawanda Road Kamwokya. Box 21509
Kampala. Uganda
Tel: +256 414 543 974
Email:
Patrick: ptumwebaze@udn.or.ug
Imelda: inamagga@udn.or.ug
Website: www.udn.or.ug

Ukraine
Illar Gaziullin
International Center for Policy Studies
Vul. Pymonenka 13A, Kyiv, Ukraine 04050
Tel: +380 44 484 4400
Email: igaziullin@icps.kiev.ua
Website: www.icps.com.ua/eng

United Kingdom
Joachim Wehner
London School of Economics and Political
Science
LSE, Government Department, Houghton Street,
London WC2A 2AE, United Kingdom
Tel: +44 20 7955 6422
Email: j.h.wehner@lse.ac.uk
Website: www.lse.ac.uk

United States of America
James Horney
Center on Budget and Policy Priorities
820 First St NE
Suite 510
Washington, DC 20002
Tel: 202-408-1080
Email: center@cbpp.org
Website: www.cbpp.org

Venezuela
Mercedes De Freitas & Jose Manuel Puente
Transparencia Venezuela
Av. Andrés Eloy Blanco, Edf. Cámara de
Comercio de Caracas, piso 2, ofc. 215, Los
Caobos, Caracas 1050, Venezuela
Tel: 58 212 5760 863
Email:
Mercedes: merchydf@cantv.net
Jose: jose.puente@iesa.edu.ve
Website: www.transparencia.org.ve

Vietnam
Saroj Dash
ActionAid Vietnam
Room 502, HEAC building, 14-16 Ham Long
street, Hoan Kiem district, Hanoi, Vietnam
Tel: +844 9439 866
Email: Saroj.Dash@actionaid.org
Website: www.actionaid.org

Pham Thuy Anh
Center for Cooperation for Human Resources
Development CENTER FOR
L building, La Thanh hotel, 218 Doi Can, Badinh.
Hanoi, Vietnam
Tel: (84-43) 7622318
Email: duan@cndvietnam.org.vn
Web site: cndvietnam.org.vn

Yemen
Dr. Raufa Hassan ALSHARKI
Yahya Hossein Alsharki
Cultural Development Programs Foundation
P.O. Box 1802
Sana’a, Yemen
Tel: +9671 486130
Email:
Raufa: raufahassan@gmail.com
Yahya: yalsharki@yemen.net.ye
Website: www.mugtama.net
ANNEX 1 – Achievement Rating Scale

* Please read the table below with a caveat, that is taking into consideration that at the moment of completion of this report we were only two
quarters into the project.
Note that there are quite a few “No Comment” in the last column of Annex 1. This is because, six months into the project, it is too early to be
expecting results and determine the impact of the various actors and variables on the achievement of most of the outputs.
Even the results achieved cannot be measured yet, because a monitoring and evaluation report has not been drafted.
Most of the activities are completely new, while the only part of the project that started before August 2008 (i.e. the beginning of the DFID grant) is
the Open Budget Survey. This is why under purpose and Output 1 we have a little more evidence and impact to describe.
<table>
<thead>
<tr>
<th>Objective Statement</th>
<th>Achievement Rating for year being assessed</th>
<th>Logframe Indicators</th>
<th>Baseline for Indicators</th>
<th>Progress against the Indicators</th>
<th>Comments on changes over the last year, including unintended impacts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purpose:</td>
<td></td>
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<tr>
<td>More governments practice transparent, accountable, and participatory Public Finance Management.</td>
<td>3</td>
<td>1. Composite country scores of the Open Budget Index in 90 countries.</td>
<td>1. OBI 2006 score for 59 countries, OBI 2008 score for the additional 26, and OBI score for five new countries in 2010.</td>
<td>1. Eight countries significantly improved their OBI score, and another 27 achieved smaller improvements in their score. See: <a href="http://www.openbudgetindex.org">www.openbudgetindex.org</a></td>
<td>The release of the OBI 2008 results received very significant media coverage, especially at the national level, in many of the 85 countries. There was a significant increase compared to the previous round, and we received several reactions/requests from governments for suggestions on how to improve. The new round of the Survey has started, covering 95 countries.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Ten documented examples of verifiable country improvements.</td>
<td>2. Baseline to be determined by the terms of reference (T.O.R.) in commissioning the case studies.</td>
<td>2. We have not yet commissioned the case studies.</td>
<td></td>
</tr>
<tr>
<td>Outputs:</td>
<td></td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(1) Accountability/Capability</td>
<td>Increased the provision by governments to the public of timely, accurate and useful public finance information.</td>
<td></td>
<td></td>
<td>1. The eight countries which significantly improved their OBI score, also improved their sub-score. Likewise, the 27 which presented smaller improvements in their OBI score, demonstrated improvements in their sub-scores as well. See: <a href="http://www.openbudgetindex.org">www.openbudgetindex.org</a></td>
<td>Note that only some of the changes can be directly attributed to our partners' activities</td>
</tr>
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<td></td>
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<tr>
<td>(2) Capability-</td>
<td></td>
<td>3</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>2(a)-New norms on best practices in Public Finance Management are created and implemented, as indicated by:</td>
<td>4</td>
<td>2(a) International standards and potential norms are introduced and debated and adopted in the</td>
<td>2 (a). Norms are not in place.</td>
<td>2 (a) Ongoing discussions with IMF, PEF, World Bank, IPU and scheduled discussions with regional representative bodies, in order to place transparency</td>
<td>No Comment*</td>
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<tr>
<td>2(b) More governments publishing Citizens Budgets.</td>
<td>3</td>
<td>appropriate international fora.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2(c) More governments holding public hearings on the budget.</td>
<td>4</td>
<td>2(b) The number of governments publishing Citizens Budgets increases to 25.</td>
<td></td>
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<td></td>
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</tbody>
</table>

### Accountability

- **Public Finance Management Guide:**
  - The guide is produced
  - Number of copies printed
  - Number of copies distributed (demand)

#### Ten governments publishing a Citizens Budget in OBI 2006.

2 (c.1) Thirty-five governments holding public hearings on macroeconomic framework in OBI 2006.

2 (c.2) Thirty-four governments holding public hearings on administrative units’ budgets in OBI 2006.

2 (b) Our partners in selected countries (Mexico, Peru, Colombia, Indonesia, Sri Lanka) are already conducting research and advocacy to induce their governments to produce and release a citizens budget. Another 10 countries will follow.

2 (c) Partners on the ground are conducting advocacy.

3 (a) Five papers have been commissioned on the following topics: 1. Link btw budget transparency and human development; 2. Economic, political & historical factors that determine budget transparency; 3. Budget transparency into their agenda.

No Comment*
<p>| | | | |</p>
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| **3** | **3 (b) Citizens Budget Guide.**  
- the guide is produced  
- number of copies printed  
- number of copies distributed (demand) | **3 (b) No Citizens Budget Guide is currently available.** | **3 (b) Extensive discussions were held with our partners during two trainings in May, and grants have been awarded to selected partners, in order to develop citizens budgets in their own countries. We will then extract guidelines from those documents and design the Guide** |
| **4** | **3 (c) Documented examples, through case studies, of the impact of transparency on sectoral Public Finance Management (e.g. extractive industries, security and health).** | **3(c) Baseline to be determined by the T.O.R. in commissioning the case studies.** | **3 (c) A concept Note from Michael Ross (oil sector) has been submitted.** |
| **5** | **3 (d) Documented examples, through case studies, of barriers to transparency on Public Finance Management, and how to overcome** | **3 (d) Baseline to be determined by the T.O.R. in commissioning the case studies.** | **3 (d) Case studies have not been commissioned yet.** |
(4) Accountability/Capability
Demonstrated the impact of greater transparency and citizen participation in Public Finance Management on socio-economic outputs.

(5) Accountability-
An effective international platform carries out advocacy calling for greater transparency in Public Finance Management.

<table>
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<td>4 (a) Documented examples of improvements in participation leading to reduced wasteful and inefficient expenditure in a selected set of countries.</td>
<td>3</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>5(a) Number of organizations that participate in meetings convened by the international platform.</td>
<td>3</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>5(b) Agreements on international advocacy strategy and joint actions undertaken.</td>
<td>3</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>5(c) Country advocacy strategies approved and funded by IBP and implemented by partners.</td>
<td>3</td>
<td>4</td>
<td>4</td>
</tr>
</tbody>
</table>

4 Choice of the indicators and the countries to be determined by the T.O.R. in commissioning the case studies.

5(a) The platform does not currently exist yet.

5(b) No examples of collaboration of CSOs in international advocacy.

5 (c) Grant-making has not begun.

4. Research has not been commissioned yet.

5. Discussions have started at regional level. Partners have organised themselves by region (South East Asia, Western Africa, Francophone Africa, Lusophone countries, Latin American countries, and Middle East), and will set up meetings and joint advocacy strategies.

No Comment*
ANNEX 2 – Programme Logframe

<table>
<thead>
<tr>
<th>Narrative Summary</th>
<th>Verifiable Indicators</th>
<th>Means of Verification</th>
<th>Assumptions and Risks</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goal:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Governments use public financial resources more efficiently, effectively and responsively. | Targeted countries improve their annual rankings on the Open Budget Index and on selected governance indicators. | 1(a) Government policy documents.  
1(b) Evaluations of government policies and practices at national and local levels.  
1(c) IBP Budget Transparency rankings and reports.  
1(d) Community based and participatory service delivery reviews. | (1) Access by the public to public finance information and decision-making is fundamental for the improvement of public finance management.  
(2) The ability of Civil Society Organizations to demand and participate in Public Finance Management is subject to a conducive country environment (political, social and economic). |
| **Purpose:**      |                       |                       |                       |
| More governments practice transparent, accountable, and participatory Public Finance Management. | 1. Composite country scores of the Open Budget Index in 90 countries.  
2(a) Approximately five case studies demonstrating improved performance/capacity in Public Finance Management at the national level.  
2(b) Approximately five case studies demonstrating improved performance/capacity in Public Finance Management at the sub-national level. | (3) The definition of government implies work at national and sub-national levels. |
### Outputs:

1) **Accountability/Capability**
   - Increased the provision by governments to the public of timely, accurate and useful public finance information.

2) **Capability**
   - 2(a) - New norms on best practices in Public Finance Management are created and implemented, as indicated by:
     - 2(b) - More governments publishing Citizens Budgets.
     - 2(c) - More governments holding public hearings on the budget.

3) **Accountability**
   - Published Guides and case studies to document current decision making practices to expand public knowledge of Public Finance Management.

| 1. Open Budget Index sub-scores measuring public access to budget information in 90 countries. |
| 2(a) International standards and potential norms are introduced and debated and adopted in the appropriate international fora. |
| 2(b) The number of governments publishing Citizens Budgets increases to 25. |
| 2(c) The number of governments holding public hearings increases to 48. |
| 3 (a) Public Finance Management Guide: - the guide is produced - number of copies printed - number of copies distributed (demand) |
| 3 (b) Citizens Budget Guide: - the guide is produced - number of copies printed - number of copies distributed (demand) |
| 3 (c) Documented examples, through case studies, of the impact of public finance management practices. |
| 2(a) Transcripts or minutes of meetings. |
| 2(b) Scores on relevant questions from the Open Budget Survey. |
| 2(c.1) Country scores on Question 61 of the Open Budget Survey. |
| 2(c.2) Country scores on Questions 75-78 on the Open Budget Survey. |
| 3(a) Number of copies of the Guide which are - Printed - Distributed |
| 3(b) Number of copies of the Citizens Budget Guide which are - Printed - Distributed |
| 3 (c) Two-three case studies documenting the impact of public finance management practices. |

(4) The definition of public includes both citizens and residents of a country.

(5) For the public to take advantage of opportunities to oversee government operations, they need to be empowered with knowledge on the political economy of decision making in Public Finance Management.

(6) The exact number of case studies/research products/grants will be determined after we hold strategic discussions with partners in the IBP network.

See Assumption (6).
<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>4) Accountability/Capability</strong>&lt;br&gt;Demonstrated the impact of greater transparency and citizen participation in Public Finance Management on socio-economic outputs.</td>
<td><strong>3 (d)</strong> Documented examples, through case studies, of barriers to transparency on Public Finance Management, and how to overcome them.</td>
<td><strong>4 (a)</strong> Documented examples of improvements in participation leading to reduced wasteful and inefficient expenditure in a selected set of countries.</td>
<td><strong>5(a) Number of organizations that participate in meetings convened by the international platform.</strong>&lt;br&gt;<strong>5(b) Agreements on international advocacy strategy and joint actions undertaken.</strong>&lt;br&gt;<strong>5(c) Country advocacy strategies approved and funded by IBP and implemented by partners.</strong></td>
</tr>
<tr>
<td><strong>5) Accountability-</strong>&lt;br&gt;An effective international platform carries out advocacy calling for greater transparency in Public Finance Management.</td>
<td><strong>3 (d) Two-Three case studies documenting the impact of barriers to transparency on Public Finance Management.</strong></td>
<td><strong>4. Approximately five case studies submitted to IBP, demonstrating reduced wasteful and inefficient expenditure in a selected set of countries.</strong></td>
<td><strong>5(a) Reports from international meetings of Civil Society Organizations.</strong>&lt;br&gt;<strong>5(b) Reports from international meetings of Civil Society Organizations and reports on advocacy conducted.</strong>&lt;br&gt;<strong>5(c) Ten grants processed and reports on the use of grant funds.</strong></td>
</tr>
</tbody>
</table>
## ANNEX 3.3 – Funds received from DFID during Reporting Period

<table>
<thead>
<tr>
<th>Payment No.</th>
<th>Date Received</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment 1</td>
<td>28/10/2008</td>
<td>£ 210,329</td>
</tr>
<tr>
<td>Payment 2</td>
<td>dd/mm/yyyy</td>
<td>£££,£££</td>
</tr>
<tr>
<td>Payment 3</td>
<td>dd/mm/yyyy</td>
<td>£££,£££</td>
</tr>
<tr>
<td>Payment 4</td>
<td>dd/mm/yyyy</td>
<td>£££,£££</td>
</tr>
<tr>
<td><strong>Total received during Period</strong></td>
<td></td>
<td><strong>£ 210,329</strong></td>
</tr>
</tbody>
</table>

## ANNEX 3.4 – Expenditure during Reporting Period (August 2008 – March 2009)

<table>
<thead>
<tr>
<th>Agreed Budget Lines</th>
<th>Agreed Budget for Period</th>
<th>Actual Expenditure for Period</th>
<th>Variance</th>
<th>Variance %</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Activity 1 – Open Budget Survey</strong></td>
<td>187,568</td>
<td>175,552.27</td>
<td>-121,875.73</td>
<td>-6.40%</td>
</tr>
<tr>
<td>Researcher Consultant Fees</td>
<td>25,920</td>
<td>20,463.84</td>
<td>-5,456.16</td>
<td>-21.05%</td>
</tr>
<tr>
<td>Peer Reviewers Consultant Fees</td>
<td>44,784</td>
<td>43,545.60</td>
<td>-1,238.40</td>
<td>-2.80%</td>
</tr>
<tr>
<td>External Reviewer Consultant Fees</td>
<td>10,816</td>
<td>41,761.04</td>
<td>30,945.04</td>
<td>286.10%*</td>
</tr>
<tr>
<td>Training and Technical Assistance for Researchers</td>
<td>0</td>
<td>0</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Translation of Questionnaire, Answers, Report</td>
<td>15,559</td>
<td>5,266.23</td>
<td>-10,292.77</td>
<td>-66.19%</td>
</tr>
<tr>
<td>Design/Print</td>
<td>0</td>
<td>0</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Dissemination/Creative Media</td>
<td>0</td>
<td>3,128.56</td>
<td>3,128.56</td>
<td>32.16%**</td>
</tr>
<tr>
<td>International, Regional &amp; National Launches</td>
<td>90,489</td>
<td>61,387.0</td>
<td>-29,102</td>
<td>-32.16%**</td>
</tr>
<tr>
<td><strong>Activity 2 – Sub-national Work</strong></td>
<td>0</td>
<td>0</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Activity 3 – Advocacy</strong></td>
<td>0</td>
<td>0</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Grants for Transparency Campaign</td>
<td>0</td>
<td>0</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>International Platform</td>
<td>0</td>
<td>0</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Activity 4 – Public Education</strong></td>
<td>0</td>
<td>0</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Activity 5 – Administration</strong></td>
<td>0</td>
<td>5,313.08</td>
<td>5,313.08</td>
<td>**</td>
</tr>
<tr>
<td><strong>Total for Period</strong></td>
<td><strong>187,568</strong></td>
<td><strong>180,865.35</strong></td>
<td><strong>-6,702.65</strong></td>
<td><strong>-3.57%</strong></td>
</tr>
</tbody>
</table>

* Due to the unexpected departure of the OBI manager, IBP had to incur additional costs for external consultants in order to prepare the OBI 2008 Report.

** Several expenses related to the international regional and national launches were paid after March 2009, and will be reflected in the June 2009 quarterly report.

*** These expenses are the expenses that part of the OBI team incurred into when travelling to London for the DFID meeting, which was supposed to be covered by DFID.
Exchange rate as for budget in inception report = 0.72
Exchange rate for money received in October 2008 = 0.648

ANNEX 3.5 – Expenditure to Date (31 March 2009) since start of Programme
(Same as A3.4)

<table>
<thead>
<tr>
<th>Agreed Budget Lines</th>
<th>Agreed Budget for Period</th>
<th>Actual Expenditure for Period</th>
<th>Variance</th>
<th>Variance %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity 1 – Open Budget Survey</td>
<td>187,568</td>
<td>175,552.27</td>
<td>-12,157.73</td>
<td>-6.40%</td>
</tr>
<tr>
<td>Researcher Consultant Fees</td>
<td>25,920</td>
<td>20,463.84</td>
<td>-5,456.16</td>
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</tr>
<tr>
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<td>-1,238.40</td>
<td>-2.80%</td>
</tr>
<tr>
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<td>41,761.04</td>
<td>30,945.04</td>
<td>286.10%*</td>
</tr>
<tr>
<td>Training and Technical Assistance for Researchers</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-</td>
</tr>
<tr>
<td>Translation of Questionnaire, Answers, Report</td>
<td>15,559</td>
<td>5,266.23</td>
<td>-1,029.77</td>
<td>-66.19%</td>
</tr>
<tr>
<td>Design/Print</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-</td>
</tr>
<tr>
<td>Dissemination/Creative Media</td>
<td>0</td>
<td>3,128.56</td>
<td>3,128.56</td>
<td></td>
</tr>
<tr>
<td>International, Regional &amp; National Launches</td>
<td>90,489</td>
<td>61,387.0</td>
<td>-29,102</td>
<td>-32.16%**</td>
</tr>
<tr>
<td>Activity 2 – Sub-national Work</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-</td>
</tr>
<tr>
<td>Activity 3 – Advocacy</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-</td>
</tr>
<tr>
<td>Grants for Transparency Campaign</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-</td>
</tr>
<tr>
<td>International Platform</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-</td>
</tr>
<tr>
<td>Activity 4 – Public Education</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-</td>
</tr>
<tr>
<td>Activity 5 – Administration</td>
<td>0</td>
<td>53,13.08</td>
<td>53,13.08</td>
<td>***</td>
</tr>
<tr>
<td>Total for Period</td>
<td>187,568</td>
<td>180,865.35</td>
<td>-6,702.65</td>
<td>-3.57%</td>
</tr>
</tbody>
</table>

ANNEX 4 – Materials produced during the reporting period
Here below is a list of the main materials produced during the reporting period.

<table>
<thead>
<tr>
<th>Item</th>
<th>Date</th>
<th>Title or description of material</th>
<th>Access web site (if any)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Date</td>
<td>Description</td>
<td>URL</td>
</tr>
<tr>
<td>---</td>
<td>--------</td>
<td>-------------------------------------------------------</td>
<td>---------------------------------------------------</td>
</tr>
</tbody>
</table>
IBP created a special new web page (www.openbudgetindex.org) to present the cross-country research findings of the 2008 Open Budget Survey. The release of the Open Budget Survey 2008 results elicited positive responses from a number of national governments and civil society organizations.

Civil society organizations based in countries not covered in the Survey (such as Italy, Israel, Canada, and Singapore) contacted IBP asking that their countries be assessed in the next Survey.

Several governments expanded the transparency of their budgeting practices. For instance, after the release of the Survey, Yemen posted the Executive’s Budget Proposal 2007-2009, the Year-end Report 2007, and the budget proposal for local councils and several other related documents on the Ministry of Finance’s website.

The New Zealand Treasury informed the Open Budget Survey researcher that partially due to the release of the Open Budget Survey, it is working to expand information regarding tax expenditures.

A member of Brazil’s Internal Audit Office contacted the IBP and discussed with us Brazil’s budget transparency ranking and possibilities for improving its score. The Audit Office expressed particular interest in producing a Citizens Budget and in strengthening oversight institutions, especially at the local level.

We are now actively preparing for the collection of the research that will comprise the 2010 Open Budget Survey. Over the course of the next year, we will support research and advocacy on the causes and consequences of lack of transparency at the subnational levels of government in select countries. We will also support the development of international platforms to guide advocacy in support of greater transparency, including developing best practice norms in Public Finance Management.