

ANNUAL REPORT 2008-09

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 ¹
Amount of DFID Funding:	3,478,687 pound sterling
Brief Summary of Program:	<p>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.</p>
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

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.

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2. List of Acronyms

CSO	Civil Society Organization
DFID	Department for International Development
GTF	Global Transparency Fund
IBP	International Budget Partnership
IMF	International Monetary Fund
INTOSAI	International Organization of Supreme Audit Institutions
M&E	Monitoring and Evaluation
NGO	Non-governmental Organization
OBI	Open Budget Initiative
OBS	Open Budget Survey
OECD	Organization for Economic Cooperation and Development
PFM	Public Finance Management
PI	Partnership Initiative
SAI	Supreme Audit Institution
TOR	Terms of Reference

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

Afghanistan	East Timor	Malawi	Sao Tome
Albania	Ecuador	Malaysia	Saudi Arabia
Algeria	Egypt	Mali	Serbia
Angola	El Salvador	Mexico	Slovenia
Argentina	Equatorial Guinea	Mongolia	South Africa
Azerbaijan	Fiji	Morocco	South Korea
Bangladesh	France	Mozambique	Sri Lanka
Bolivia	Georgia	Namibia	Sudan
Bosnia-Herzegovina	Germany	Nepal	Sweden
Botswana	Ghana	New Zealand	Tanzania
Brazil	Guatemala	Nicaragua	Thailand
Bulgaria	Honduras	Niger	Trinidad y Tobago
Burkina Faso	India	Nigeria	Turkey
Cambodia	Indonesia	Norway	Uganda
Cameroon	Iraq	Pakistan	Ukraine
Chad	Italy	Papua New Guinea	United Kingdom
China	Jordan	Peru	United States
Colombia	Kazakhstan	Philippines	Venezuela
Costa Rica	Kenya	Poland	Vietnam
Croatia	Kyrgyz Republic	Portugal	Yemen
Czech Republic	Lebanon	Romania	Zambia
Democratic Republic of Congo	Liberia	Russia	
Dominican Republic	Macedonia	Rwanda	

ANNEX B: LIST OF OBI IMPLEMENTING PARTNERS IN EACH COUNTRY

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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.

Objective Statement	Achievement Rating for year being assessed	Logframe Indicators	Baseline for Indicators	Progress against the Indicators	Comments on changes over the last year, including unintended impacts
<p>Purpose:</p> <p>More governments practice transparent, accountable, and participatory Public Finance Management.</p>	3	1. Composite country scores of the Open Budget Index in 90 countries.	1. OBI 2006 score for 59 countries, OBI 2008 score for the additional 26, and OBI score for five new countries in 2010.	1. <i>Eight countries significantly improved their OBI score, and another 27 achieved smaller improvements in their score. See: www.openbudgetindex.org</i>	<p>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.</p>
	5	2. Ten documented examples of verifiable country improvements.	2. Baseline to be determined by the terms of reference (T.O.R.) in commissioning the case studies.	2. <i>We have not yet commissioned the case studies</i>	
<p>Outputs:</p> <p>(1) Accountability/Capability Increased the provision by governments to the public of timely, accurate and useful public finance information.</p> <p>(2) Capability- 2(a)-New norms on best practices in Public Finance Management are created and implemented, as indicated by:</p>	3	1. Open Budget Index sub-scores measuring public access to budget information in 90 countries.	1. OBI 2006 sub-scores for 59 countries, OBI 2008 sub-scores for the additional 26, & for five new countries in 2010.	1. <i>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: www.openbudgetindex.org</i>	<p>Note that only some of the changes can be directly attributed to our partners' activities</p> <p>No Comment*</p>
	4	2(a) International standards and potential norms are introduced and debated and adopted in the	2 (a). Norms are not in place.	2 (a) <i>Ongoing discussions with IMF, PEF, World Bank, IPU and scheduled discussions with regional representative bodies, in order to place transparency</i>	

<p>2(b)- More governments publishing Citizens Budgets.</p>	<p>3</p>	<p>appropriate international fora.</p> <p>2(b) The number of governments publishing Citizens Budgets increases to 25.</p>	<p>2 (b) Ten governments publishing a Citizens Budget in OBI 2006.</p>	<p><i>into their agenda.</i></p> <p><i>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.</i></p>	<p><i>No Comment*</i></p>
<p>2(c)-More governments holding public hearings on the budget.</p>	<p>4</p>	<p>2(c) The number of governments holding public hearings increases to 48.</p>	<p>2 (c.1) Thirty-five governments holding public hearings on macroeconomic framework in OBI 2006.</p> <p>2 (c.2) Thirty-four governments holding public hearings on administrative units' budgets in OBI 2006</p>	<p><i>2 (c) Partners on the ground are conducting advocacy.</i></p>	<p><i>No Comment*</i></p>
<p>(3) Accountability- Published Guides and case studies to document current decision making practices to expand public knowledge of Public Finance Management.</p>	<p>3</p>	<p>3 (a) Public Finance Management Guide: - the guide is produced - number of copies printed - number of copies distributed (demand)</p>	<p>3 (a) No PFM guide designed for use by the public is currently available.</p>	<p><i>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</i></p>	<p><i>No Comment*</i></p>

				<p><i>transparency in Oil Producing Countries; 4. Budget Transparency and Fiscal Outcomes; 5. Role of donor aid in reducing budget transparency; They will constitute the chapters of the PFM Guide.</i></p>	
	3	<p>3 (b) Citizens Budget Guide. -the guide is produced - number of copies printed - number of copies distributed (demand)</p>	<p>3 (b) No Citizens Budget Guide is currently available.</p>	<p><i>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</i></p>	<p><i>No Comment*</i></p>
	4	<p>3 (c) Documented examples, through case studies, of the impact of transparency on sectoral Public Finance Management (e.g. extractive industries, security and health).</p>	<p>3(c) Baseline to be determined by the T.O.R. in commissioning the case studies.</p>	<p><i>3 (c) A concept Note from Michael Ross (oil sector) has been submitted.</i></p>	<p><i>No Comment*</i></p>
	5	<p>3 (d) Documented examples, through case studies, of barriers to transparency on Public Finance Management, and how to overcome</p>	<p>3 (d) Baseline to be determined by the T.O.R. in commissioning the case studies.</p>	<p><i>3 (d) Case studies have not been commissioned yet.</i></p>	<p><i>No Comment*</i></p>

<p>(4) Accountability/Capability Demonstrated the impact of greater transparency and citizen participation in Public Finance Management on socio-economic outputs.</p> <p>(5) Accountability- An effective international platform carries out advocacy calling for greater transparency in Public Finance Management.</p>	<p>5</p> <p>4</p>	<p>them.</p> <p>4 (a) Documented examples of improvements in participation leading to reduced wasteful and inefficient expenditure in a selected set of countries.</p> <p>5(a) Number of organizations that participate in meetings convened by the international platform.</p> <p>5(b) Agreements on international advocacy strategy and joint actions undertaken.</p> <p>5(c) Country advocacy strategies approved and funded by IBP and implemented by partners.</p>	<p>4 Choice of the indicators and the countries to be determined by the T.O.R. in commissioning the case studies.</p> <p>5 (a) The platform does not currently exist yet.</p> <p>5(b) No examples of collaboration of CSOs in international advocacy.</p> <p>5 (c) Grant-making has not begun.</p>	<p><i>4. Research has not been commissioned yet.</i></p> <p><i>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</i></p>	<p><i>No Comment*</i></p> <p><i>No Comment*</i></p>
<p>Activities</p> <p>1. Open Budget Survey</p> <p>2. Subnational Work</p> <p>3. Advocacy (OBI, Subnational, Public Education)</p>	<p>3</p> <p>4</p> <p>4</p> <p>3</p>			<p>Activity 1 linked to Output 1</p> <p>Activity 2 linked to Outputs 3 and 4</p> <p>Activity 3 linked to Outputs 1, 2, 3</p>	

4. Public Education	5			Activity 4 linked to Output	
5. Administration					

ANNEX 2 – Programme Logframe

Narrative Summary	Verifiable Indicators	Means of Verification	Assumptions and Risks
<p>Goal:</p> <p>Governments use public financial resources more efficiently, effectively and responsively.</p>	<p>Targeted countries improve their annual rankings on the Open Budget Index and on selected governance indicators.</p>	<p>1(a) Government policy documents.</p> <p>1(b) Evaluations of government policies and practices at national and local levels.</p> <p>1(c) IBP Budget Transparency rankings and reports.</p> <p>1(d) Community based and participatory service delivery reviews.</p>	<p>(1) Access by the public to public finance information and decision-making is fundamental for the improvement of public finance management.</p> <p>(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).</p>
<p>Purpose:</p> <p>More governments practice transparent, accountable, and participatory Public Finance Management.</p>	<p>1. Composite country scores of the Open Budget Index in 90 countries.</p> <p>2. Ten documented examples of verifiable country improvements.</p>	<p>1. Biennial Open Budget Index in 2008, 2010 and 2012.</p> <p>2(a) Approximately five case studies demonstrating improved performance/capacity in Public Finance Management at the national level.</p> <p>2(b) Approximately five case studies demonstrating improved performance/capacity in Public Finance Management at the sub-national level.</p>	<p>(3) The definition of government implies work at national and sub-national levels.</p>

<p>Outputs:</p> <p>1) Accountability/Capability Increased the provision by governments to the public of timely, accurate and useful public finance information.</p> <p>2) Capability- 2(a)-New norms on best practices in Public Finance Management are created and implemented, as indicated by:</p> <p>2(b)- More governments publishing Citizens Budgets.</p> <p>2(c)-More governments holding public hearings on the budget.</p> <p>3) Accountability- Published Guides and case studies to document current decision making practices to expand public knowledge of Public Finance Management.</p>	<p>1. Open Budget Index sub-scores measuring public access to budget information in 90 countries.</p> <p>2(a) International standards and potential norms are introduced and debated and adopted in the appropriate international fora.</p> <p>2(b) The number of governments publishing Citizens Budgets increases to 25.</p> <p>2(c) The number of governments holding public hearings increases to 48.</p> <p>3 (a) Public Finance Management Guide: - the guide is produced - number of copies printed - number of copies distributed (demand)</p> <p>3 (b) Citizens Budget Guide. -the guide is produced - number of copies printed - number of copies distributed (demand)</p> <p>3 (c) Documented examples, through case studies, of the</p>	<p>1. Biennial Open Budget Index in 2008, 2010 and 2012.</p> <p>2(a) Transcripts or minutes of meetings.</p> <p>2(b) Scores on relevant questions from the Open Budget Survey.</p> <p>2(c.1) Country scores on Question 61 of the Open Budget Survey.</p> <p>2(c.2) Country scores on Questions 75-78 on the Open Budget Survey.</p> <p>3(a) Number of copies of the Guide which are - Printed - Distributed</p> <p>3(b) Number of copies of the Citizens Budget Guide which are - Printed - Distributed</p> <p>3 (c) Two-three case studies documenting the impact of</p>	<p>(4) The definition of public includes both citizens and residents of a country.</p> <p>(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.</p> <p>(6) The exact number of case studies/research products/grants will be determined after we hold strategic discussions with partners in the IBP network.</p> <p>See Assumption (6).</p>
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<p>4) Accountability/Capability Demonstrated the impact of greater transparency and citizen participation in Public Finance Management on socio-economic outputs.</p> <p>5) Accountability- An effective international platform carries out advocacy calling for greater transparency in Public Finance Management.</p>	<p>impact of transparency on sectoral Public Finance Management (e.g. extractive industries, security and health).</p> <p>3 (d) Documented examples, through case studies, of barriers to transparency on Public Finance Management, and how to overcome them.</p> <p>4 (a) Documented examples of improvements in participation leading to reduced wasteful and inefficient expenditure in a selected set of countries.</p> <p>5(a) Number of organizations that participate in meetings convened by the international platform.</p> <p>5(b) Agreements on international advocacy strategy and joint actions undertaken.</p> <p>5(c) Country advocacy strategies approved and funded by IBP and implemented by partners.</p>	<p>transparency on sectoral Public Finance Management.</p> <p>3 (d) Two-Three case studies documenting the impact of barriers to transparency on Public Finance Management.</p> <p>4. Approximately five case studies submitted to IBP, demonstrating reduced wasteful and inefficient expenditure in a selected set of countries.</p> <p>5(a) Reports from international meetings of Civil Society Organizations.</p> <p>5(b) Reports from international meetings of Civil Society Organizations and reports on advocacy conducted.</p> <p>5(c) Ten grants processed and reports on the use of grant funds.</p>	<p>See Assumption (6).</p> <p>See Assumption (6).</p>
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ANNEX 3.3 – Funds received from DFID during Reporting Period

Payment No.	Date Received	Amount
Payment 1	28/10/2008	£ 210,329
Payment 2	dd/mm/yyyy	£££,£££
Payment 3	dd/mm/yyyy	£££,£££
Payment 4	dd/mm/yyyy	£££,£££
Total received during Period		£ 210,329

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

Agreed Budget Lines	Agreed Budget for Period	Actual Expenditure for Period	Variance	Variance %
Activity 1 – Open Budget Survey	187568	175552.27	- 12157.73	- 6.40%
Researcher Consultant Fees	25,920	20463.84	- 5456.16	-21.05%
Peer Reviewers Consultant Fees	44,784	43545.60	- 1238.40	- 2.80%
External Reviewer Consultant Fees	10,816	41761.04	30945.04	286.10%*
Training and Technical Assistance for Researchers	0	0	-	-
Translation of Questionnaire, Answers, Report	15,559	5266.23	- 1029.77	-66.19%
Design/Print	0	0	-	-
Dissemination/Creative Media	0	3128.56	3128.56	
International, Regional & National Launches	90489	61387.0	-29102	-32.16%**
Activity 2 – Sub-national Work	0	0	-	-
Activity 3 – Advocacy	0	0	-	-
Grants for Transparency Campaign	0	0	-	-
International Platform	0	0	-	-
Activity 4 – Public Education	0	0	-	-
Activity 5 – Administration	0	5313.08	5313.08	***
Total for Period	187,568	180,865.35	-6702.65	-3.57%

* Due to the unexpected departure of the OBI manager, IBP had to incur into 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)

Agreed Budget Lines	Agreed Budget for Period	Actual Expenditure for Period	Variance	Variance %
Activity 1 – Open Budget Survey	187568	175552.27	- 12157.73	- 6.40%
Researcher Consultant Fees	25,920	20463.84	- 5456.16	-21.05%
Peer Reviewers Consultant Fees	44,784	43545.60	- 1238.40	- 2.80%
External Reviewer Consultant Fees	10,816	41761.04	30945.04	286.10%*
Training and Technical Assistance for Researchers	0	0	-	-
Translation of Questionnaire, Answers, Report	15,559	5266.23	- 1029.77	-66.19%
Design/Print	0	0	-	-
Dissemination/Creative Media	0	3128.56	3128.56	
International, Regional & National Launches	90489	61387.0	-29102	-32.16%**
Activity 2 – Sub-national Work	0	0	-	-
Activity 3 – Advocacy	0	0	-	-
Grants for Transparency Campaign	0	0	-	-
International Platform	0	0	-	-
Activity 4 – Public Education	0	0	-	-
Activity 5 – Administration	0	5313.08	5313.08	***
Total for Period	187,568	180,865.35	-6702.65	-3.57%

ANNEX 4 – Materials produced during the reporting period

Here below is a list of the main materials produced during the reporting period.

Item	Date	Title or description of material	Access web site (if any)
1.	Jan 2009	OBI Full Report: "Open Budgets, Transform Lives"	http://www.openbudgetindex.org/index.cfm?fa=fullReport
2.	Dec 2009	Song: "It's our money"	http://www.openbudgetindex.org/cms/index.cfm?fa=view&id=2452
3.	Jan 2009	Poster on results for OBI 2008	http://openbudgetindex.org/files/OBI_Poster-36x24.pdf
4.	Dec 2008	Postcards in English, Spanish, French and Portuguese on OBI 2008	http://www.openbudgetindex.org/index.cfm?fa=poster

5.	Jan 2009	Country Summaries for 85 countries	http://www.openbudgetindex.org/countryData/
6.	Jan 2009	Policy Brief Template	http://www.openbudgetindex.org/index.cfm?fa=policyBrief
7.	Jan 2009	Pod Casts on OBI 2008 Results	http://www.openbudgetindex.org/index.cfm?fa=multimedia
8.	Jan 2009	Press Release on the OBI 2008	http://www.openbudgetindex.org/index.cfm?fa=ipr

ANNEX 5 – Web Update



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.