

MAKING AID MORE EFFECTIVE THROUGH GENDER, RIGHTS AND INCLUSION: EVIDENCE FROM IMPLEMENTING THE PARIS DECLARATION

Bolivia Case Study



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Preface and Acknowledgements

This is one of six country case studies (Bangladesh, Bolivia, Kenya, Sierra Leone, Uganda and Vietnam) undertaken as part of a study supported by the British, Dutch, Irish and Norwegian governments that aims to:

- Generate an evidence base on how human rights, gender and equity issues have been integrated into and benefit current approaches to aid effectiveness.
- Build support among Paris Declaration stakeholders.
- Provide practical recommendations for strengthening the focus on human rights, social exclusion and gender equality, and poverty outcomes, for the Third High Level Forum in Ghana (2008) and beyond.

A Synthesis Report has been prepared that draws on the country case studies (together with additional desk-based case studies) to provide overall findings and recommendations.

The study team comprised Marcelo Barron Arce (IDB), Sean Conlin (Social Development Direct) and Carlos Toranzo (Friedrich Ebert Stiftung in La Paz).

Thanks are due to staff in IDB and DFID Bolivia staff who helped in facilitating the team's visit, notably Jennie Richmond who agreed to the use of DFID resources at short notice and to Sara Shields for logistical support.

The study visit in December 2007 took place in a time of heightened political tension in Bolivia with government party and opposition demonstrations in the streets and confrontation between the autonomous regions and the central government. This limited the ability of the team to meet all the people they would have wished to see. Nonetheless, the team met with a broad range of stakeholders including some government officials and non-governmental organisations, civil society representatives, ex-parliamentarian, and development partners (a list of people met is provided at the end of this report). As well as individual meetings, a half-day workshop was held with local NGOs. As well as the interviews and meetings, the team also reviewed relevant documentation listed at the end of this report. It must be noted that much of the documentation produced in English by international organisations have been rendered out of date as a result of the election and subsequent strategies of the new Government in 2005.

This study represents the views of the consultants alone and conclusions or comments should not be attributed to the governments and donor agencies involved in supporting the study.

Executive Summary

This country case study contributes to gathering evidence on the relationship between aid effectiveness and gender equality, human rights and social exclusion, focused on strengthening the poverty impact of the Paris Declaration. The aim of the overall study is:

- to generate an evidence base on how human rights, gender and equity issues have been integrated into and benefit current approaches to aid effectiveness
- to build support among Paris Declaration stakeholders
- to provide practical recommendations for strengthening the focus on the cross-cutting issues of gender equality, human rights and social exclusion, and poverty outcomes, for the Third High Level Forum in Ghana (2008) and beyond.

The study involved a review of the aid effectiveness and social issue context, and three more detailed case studies of particular initiatives.

Aid effectiveness context

A key feature of the aid context is the negative perception of past experience of structural adjustment and liberalisation reforms and the strong articulation of sovereignty over policy making and aid management, asserted by the Evo Morales government elected in 2005. While there has previously been progress in developing sector wide approaches and partnership and dialogue arrangements, the new government's approach has not generally been receptive to the approaches and structures for aid envisaged in the Paris Declaration.

Country ownership

The current Government exercises a high degree of ownership of the policy and aid agenda, seeing this as central to Bolivian sovereignty, and taking advantage of the strong recent fiscal position resulting from hydrocarbon revenues to reduce aid dependence, as well as seeking engagement with non-traditional donors. The National Development Plan (PND) has a central aim of addressing the collective rights and social exclusion of indigenous peoples. The PND enjoys electoral legitimacy but it does not have the broad support enjoyed by the earlier Poverty Reduction Strategy Paper.

Mutual accountability

Mutual accountability – both in the government's relationship with civil society and with donors -- is problematic within the current political context of Bolivia. First, the current government gained a clear electoral victory, giving it national legitimacy. But it also faces strong opposition at the regional level, especially following important decentralisation initiatives. Second, there has been pressure on opposition elements of civil society and the media. Third, the government's concern with sovereignty in the aid relationship has made it wary of mutual accountability arrangements with donors.

Alignment

The government expects donors to align with the PND, but the PND lacks clear articulation with the different sectors, which makes alignment difficult. In consequence, donors look to support specific sectoral policies with which they agree. There is little use of the systems, institutions and mechanisms of the State.

Harmonisation

There has been some progress in harmonisation led by bilateral donors including through the Group of Partners for Bolivia's Development (GruS) which has a relatively strong focus on social issues. Multilateral agencies have not pursued harmonisation and government has not taken a lead.

Managing for results

Although the National Development Plan provides a potential basis for a common results framework, the focus of donors and government has tended to be on operational rather than on development results, particularly in relation to public financial management.

Rights, social exclusion and gender equality: context

The election of Evo Morales as President in December 2005 was a turning point in Bolivian politics. In its National Development Plan (PND) the government has set out a vision of development that incorporates concerns for human rights and social inclusion, in particular the economic, social and cultural rights of the indigenous peoples. It is informed by an "indigenista" political philosophy that provides an important narrative for political legitimisation but this philosophy does not necessarily translate into operational public policies.

The government's vision of rights leads directly to the concept of social inclusion. The PND does not just aim to include the excluded groups in development but to dismantle the colonial structures that marginalised them. The Plan proposes to transform the colonial, neo-liberal and patriarchal State into a communitarian State where women, different generations and people of different capacities can fully exercise their rights without discrimination, exclusion or violence.

The PND has resonance with the donors' concept of social inclusion but the radical political programme of institutional change and redistribution goes beyond donor neo-liberal concepts. Important sections of civil society (suspicious of the institutions of representative democracy and of donor-supported structural adjustment and liberalisation) strongly support the government's programme while opposition voices in civil society and media have come under pressure.

Although there has been important progress in recent years on gender equality, some consider that the indigenous concepts of male and female roles referred to in the PND are not conducive to gender equality, while the Viceministry for Gender is regarded as weak.

Case study examples

The examples for more detailed analysis were the following:

- Support to the office of the Defensor del Pueblo. This example was selected because of the key role of the office in the protection of human rights, and the use of basket funding arrangements by donors providing support.
- Support to the Education Sector. There has been a promising initiative to establish a sectorwide approach supported by basket funding arrangements for the education sector. Although there have been significant achievements in improving gender equality in education, the sustainability of reform initiatives has been undermined by a perception that the reform strategy did not address the social inclusion concerns of the current government.
- Extending rights of access to Basic Sanitation. The Bolivian government has set out a strong commitment to improving access to water and sanitation services in the PND as part of its programme to address ethnic and regional inequalities in access. However, initiatives to move

towards a sectorwide approach in support of this objective have been hampered by institutional weaknesses as well as lack of agreement on key aspects of sectoral policy.

Findings

The Bolivian government has set out a development strategy that focuses on addressing social exclusion and the collective rights of peasant farmers and indigenous peoples. Commitment to social goals is therefore absolutely central to the government's programme and this commitment reflects the views of substantial elements of civil society. These elements of civil society have also been strongly critical of the effects of foreign interference and in particular of the role of international financial institutions and bilateral donors in promoting neo-liberal reforms under structural adjustment. The Paris Declaration is viewed with suspicion as potentially a new form of conditionality. The Bolivian government wants donors to align around the National Development Plan but has preferred bilateral to multilateral processes of dialogue and has sought to reduce dependence on aid especially from traditional donors. There has however been some progress in developing the role of the Group of Partners for the Development of Bolivia (GruS). At the same time, the government's programme and underlying philosophy is strongly contested by other elements of Bolivian civil society and by the opposition which controls many local governments, and the government's human rights record has been criticised. Political unrest and uncertainty have militated against effective implementation of the NDP.

The limited progress in taking forward the aid effectiveness agenda, and the political difficulties that have impeded implementation of the government's programme, mean that specific findings in relation to the interaction between the aid effectiveness agenda (for instance through the use of new aid instruments) and social issues are few. The case studies do suggest the following:

- Donors have successfully supported the strengthening of accountability processes and structures through support to the Defensor del Pueblo.
- The weakness of the Viceministry of Gender has required the use of additional sectoral mechanisms of support despite the existence of a basket funding arrangement for gender mainstreaming.
- Moves towards sectorwide approaches in education and water and sanitation have shown promise in helping to further particular social goals, but progress has stalled as a result of lack of agreement on key aspects of policy and problems relating to institutional capacity in government to carry through highly ambitious programmes in a charged political atmosphere.
- Basket funding arrangements have helped to further donor support for social goals and have to some extent encouraged harmonisation and alignment, although there remain challenges for some donors in being able to attribute results so as to respond to domestic accountability concerns.

Conclusions

Country ownership and mutual accountability

Bolivia's recent experience illustrates starkly the difficulties donors can face in a situation where a legitimately elected government has a strong commitment to a programme that is driven by ambitious social goals, but where the form these goals take and the approaches proposed to further them are hugely politically contentious. The experience also shows that the PD principles can be strongly contested by both a government and by civil society organisations that are committed to social objectives. Dissatisfaction with the record of aid in Bolivia has led to a suspicion in government as well as in important elements of civil society about the forms of mutual accountability that the Paris Declaration envisages. These are seen as potentially limiting both sovereignty and ownership, and undermining accountability to the ultimate beneficiaries of aid.

Despite this, there is continuing engagement by the Bolivian government with PD processes which may provide an opportunity for confidence building.

Donors need to find ways of maintaining dialogue and engagement (with government and civil society including both advocates and opponents of current policies), although the prospects for taking forward a more ambitious aid effectiveness agenda are limited by the current political tensions, as are the prospects for effective action to take forward the ambitious government social agenda. The continued engagement with PD processes (such as the country evaluation of the PD and the continuing operation of the GruS) does provide an opportunity for such dialogue and confidence building.

To fulfil these commitments effectively requires a strengthened capacity to implement a socially progressive policy framework. This means capacity building for integrating social *goals and processes* of rights fulfilment into programme design. Most interlocutors agree that the government of Bolivia – including its Ministers and Ministry officials -- presently does not have the capacity to implement its philosophical commitments effectively. At the same time, the government's programme is contested within the polarized political system.

Harmonisation and alignment

The Bolivian example provides only limited evidence on the harmonisation and alignment agenda in relation to social issues. Basket funding arrangements have shown potential for improving the effectiveness of donor support in specific areas. There was significant progress in moving towards sectorwide approaches that have incorporated social goals, but these have at least partially stalled as a result of policy disagreements and uncertainties about proposed approaches for implementing government programmes, despite a general willingness of donors to align on the National Development Plan. There has been some progress in the harmonisation and alignment agenda, with some specific focus on social issues in these processes.

Managing for development results

There has so far been little progress in strengthening the focus on results of aid. There is scope for progress here since the government also wishes to show results to its supporters. There is a particular opportunity for donors to focus on strengthening the technical capacity within government to conduct social analysis of policy outcomes and impacts, and to support monitoring instruments that generate socially- (including sex-) disaggregated quantitative and qualitative data, measuring social progress towards politically-endorsed rights fulfilment goals.

Table of contents

Preface and Acknowledgements	i
Executive Summary	ii
List of tables	vii
Abbreviations	viii
1 Introduction	1
2 Context: Aid Effectiveness	2
2.1 Aid in Bolivia	2
2.2 Attitudes towards aid and progress with the Paris Declaration agenda	2
3 Context: Human rights, Social exclusion, Gender equality	7
3.1 The role of civil society	7
3.2 Human rights	7
3.3 Social exclusion	9
3.4 Gender equality	10
4 Case Study Examples	12
4.1 Promotion of human rights by the Defensor del Pueblo	12
4.2 Support to the education sector	14
4.3 Extending rights of access to basic sanitation	16
5 Findings	19
6 Conclusions	20
List of documents	22
List of people met	25
Annex A Terms of reference	27
Annex B Summary information on poverty in Bolivia	33
Annex C Multi-Donor Budget Support Program (PMAP) 2005 Policy Matrix	36

List of tables

Table B.1	Under 5 mortality and access to water and sanitation	34
Table B.2	Progress with MDGs, including regional variations	35

Abbreviations

BID	Banco Interamericano de Desarrollo (Inter-American Development Bank)
CAF	Corporacion Andina de Fomento (Andean Development Corporation)
CAN	Comunidad Andina de Naciones (Andean Community of Nations)
CIDA	Canadian International Development Agency
COSUDE	Swiss Development Agency
CSO	Civil Society Organisation
DAC	Development Assistance Committee
DFID	Department for International Development
EBRP	la Estrategia Boliviana de Reducción de la Pobreza
FASE	Fondo de Apoyo al Sector Educativo (Education Support Fund)
GENDERNET	DAC Network on Gender Equality
GNI	Gross Domestic Income
GruS	Grupo de los Socios para el Desarrollo de Bolivia (Group of Partners for the Development of Bolivia)
IDA	International Development Agency
IDB	Inter-American Development Bank
INE	Instituto Nacional de Estadística (National Statistics Institute)
JICA	Japan International Cooperation Agency
LCG	Local Consultative Group
MDG	Millennium Development Goals
NGO	Non-Government Organisation
NORAD	Norwegian Agency for Development Cooperation
ODA	Overseas Development Assistance
ODM	Objetivos de Desarrollo del Milenio (Millennium Development Goals)
OECD	Organisation for Economic Cooperation and Development
OPM	Oxford Policy Management

PD	Paris Declaration
PIU	Project Implementation Unit
PND	Plan Nacional de Desarrollo (National Development Plan)
POMA	Programa Operativo Multianual (Multiannual Work Programme)
PRSP	Poverty Reduction Strategy Paper
SDD	Social Development Direct
SIDA	Swedish Development Agency
SWAp	Sector-Wide Approach
TA	Technical Assistance
UDAPE	Unidad de Análisis de Política Económica (Political Economy Analysis Unit)
UK	United Kingdom
UN	United Nations
UNDP	United Nations Development Program
UNICEF	United Nations Children's Fund
UNIFEM	United Nations Development Fund for Women
USD	United States Dollars

1 Introduction

This country case study assesses how gender, rights and exclusion are being addressed in Bolivia in the “new aid environment” of the Paris Declaration and specifically through the aid instruments, partnerships, and dialogue and accountability processes that provide the mechanisms through which the Paris Declaration and its Principles are being operationalised.

Bolivia provides an example of a country whose government has set out a development strategy that focuses strongly on addressing social exclusion and the collective rights of peasant farmers and indigenous peoples, reflecting the views of substantial elements of civil society. The Bolivian government wants donors to align around its National Development Plan but has preferred bilateral to multilateral processes of dialogue and has sought to reduce dependence on aid especially from traditional donors and there has been some suspicion of the Paris Declaration as representing a new form of conditionality and a constraint on Bolivian sovereignty. The government’s programme and its underlying “indigenista” philosophy are strongly contested and political unrest and uncertainty have militated against effective implementation of its plans.

The case study report is structured as follows. Section 2 summarises the main features of aid in Bolivia and provides an overview of progress in application of the PD Principles. Section 3 provides an overview of the opportunities and challenges for gender equality, social exclusion and human rights in Bolivia and the main policy initiatives to address these challenges. Section 4 focuses on specific examples of how gender, rights and exclusion are being addressed as part of the aid effectiveness agenda. The examples selected were:

- Support to the office of the Defensor del Pueblo in protecting human rights;
- Support to the education sector with a focus on gender equality issues;
- Extending rights to basic sanitation to address ethnic and regional inequalities.

Section 5 presents the findings of the case study for Bolivia. These highlight the limited progress in taking forward the aid effectiveness agenda in a context where the Paris Declaration is viewed with some suspicion and where political tensions have impeded implementation of the government’s ambitious social agenda, but identify some positive experience from the use of harmonised funding arrangements by donors.

Section 6 provides conclusions and wider reflections from the experience reviewed in terms of the relationship between the Paris Declaration Principles and progress in addressing gender equality, rights and exclusion.

Annex A contains the study terms of reference and Annex B information on poverty in Bolivia. Annex C provides the action matrix for the multidonor budget support arrangement that was abandoned in 2006.

2 Context: Aid Effectiveness

2.1 Aid in Bolivia

Between 2002 and the first quarter of 2007, multilateral and bilateral agencies disbursed more than three billion dollars of aid to Bolivia, of which 37.5% were grants and 62.5% commercial and concessional loans. The largest disbursements were from CAF (Corporación Andina de Fomento) (USD 882 million), the Interamerican Development Bank (USD 574 million) and the World Bank (USD 481.6 million). Amongst the bilaterals, the largest disbursements came from USAID (USD 314.7 million), the European Commission (USD 222.4 million) and Germany (USD 188.6 million). The annual average share of aid was nearly 9% of the GDP.

Since 2005, the Bolivian economy has benefited from a favourable external environment which has helped to maintain moderate growth despite the domestic political uncertainty which has adversely affected private investment. Export prices have been high for hydrocarbons and mineral products, for which there has been strong growth in production volumes since the start of the decade. GDP grew by approximately 4½ percent in 2006, mainly due to an expansion in the hydrocarbons, manufacturing and financial services sectors. State revenues also gained from the renegotiation of contracts with oil and gas companies. As a result the fiscal position improved significantly and the external current account registered a strong surplus in 2006. Net International Reserves (NIR) registered historically high levels (approximately USD 4.2 billion in mid-August 2007). Bolivia's public debt has decreased markedly, principally via debt relief under the Multilateral Debt Relief Initiative (MDRI). Public debt fell from approximately 70 percent of the GDP in 2005 to around 35 percent in 2007.

The current Bolivian government, since the election victory of Evo Morales at the end of 2005, has sought to use this reduced dependence on aid from traditional sources, and to bring about a fundamental change in the nature of the relationship with donors, based on a reassertion of national sovereignty and the seeking of donor alignment around the National Development Plan¹ (PND) that seeks to address the collective rights and social exclusion of indigenous peoples, implemented through a redistributive agenda built on the appropriation of natural resource rents by the state. An overview of the political context for aid effectiveness in Bolivia is provided in Box 2.1)

2.2 Attitudes towards aid and progress with the Paris Declaration agenda

There is a high level of suspicion in Bolivia about the role of international aid and the perceived effects of foreign influence (through both aid and foreign investment). This is reflected in the policies and approach of the current government since its 2005 election victory. This victory owed much to concern about excessive external influence in the development policies, which is in part a legacy of Bolivia's experience under structural adjustment (see section 3.2). More recently, the Multidonor Program of Budgetary Support (PMAP) was also seen by government and some CSOs imposing unacceptable conditions, although it had been envisaged by donors as promoting the alignment of aid towards Government policies. Disbursement of budget support was in accordance with the fulfillment of a mutually agreed matrix of actions to be developed by the Government. Budget support was not disbursed in 2005 because donors considered that the poverty reduction strategy was not being implemented. The PMAP was cancelled in 2006.

¹ Plan Nacional de Desarrollo: Bolivia digna, soberana, productiva y democrática para Vivir Bien. (National Development Plan: Bolivia – dignified, sovereign, productive and democratic to live well.) The Plan is at <http://www.ine.gov.bo/pdf/PND/00.pdf>

Box 2.1 Political context in Bolivia

Following an acute macroeconomic crisis between 1985 and 1995, some important structural reforms were carried out including the privatization of state-owned companies, the reform of pensions, educational reform, health reform, the Law of Popular Participation, and the Administrative Decentralisation law. In the case of the social sectors, government spending has been increasing for several years and this appears to have had some effect on overall development results, as shown in Annex B.

However, despite some successes in these reforms, since 1999 Bolivia has entered into a period of convulsion and social protest, with a weakening of the state's authority. This situation steadily worsened between 2003 and 2005 with an increasing number of protests and violence. This resulted in a referendum on reform of the Political Constitution of the State and commitments to introduce departmental autonomy in 2006. Some additional electoral reforms were also introduced to promote the participation of citizens' associations in the national, departmental and municipal election processes.

The election of Evo Morales Ayma as President of Bolivia in December 2005 with 54% of the vote was a turning point in Bolivian politics, changing the relationship between the state and civil society as Morales represents social movements with a strong redistributive agenda focused on the appropriation of natural resource rents by the state. The Morales government took back state ownership of hydrocarbons, negotiating better conditions of costs and income through taxes with trans-national companies and neighbouring governments. Additionally the metalworking company Vinto, the principal tin foundry of the country, was nationalised. These "nationalisations" are seen by a great part of the population as the mechanism for guaranteeing employment and income for Bolivians, especially the most impoverished sections, though these expectations have not been realised.

In 2006, Bolivians also elected Prefects (who head "departments", equivalent to provinces) for the first time in their history, following the 2006 referendum. This can also be seen as an important political development and is a direct consequence of the pressure for regional autonomy pursued by Civil Committees which have wanted to manage in their own way the destinies and resources of their own regions. However, the Bolivian political situation has not subsequently improved and centre-local relationships have continued to be a focus of protest and violence. In Santa Cruz and Beni, moves towards declaring autonomy took place. In at least six regions of the country protest measures were adopted against the government budget which cut department revenues from hydrocarbon tax.

The increased social instability and weakening of government control have had a negative impact on the prospects for reducing poverty despite the government's strong commitment to social objectives. The Government has a majority in the Chamber of Deputies, while the opposition controls the Senate, so the Government has difficulty carrying through its legislative programme, and has had to have its budget approved by Decree rather than through Congressional agreement.

Source: Authors' analysis

This decision was considered by many Bolivians to be insensitive to the country's very difficult political situation at the time (Bolivia had had six presidents in five years). Subsequently the government has turned down an offer of sectoral budget support from the European Commission because Bolivia was unwilling to have this made dependent on completion of a PEFA (Public Expenditure and Financial Assessment), feeling the PEFA indicators were not relevant to Bolivian conditions.

The Paris Declaration therefore did not receive much attention, at least for the first part of the Morales Administration. In October 2007, the Government promulgated Supreme Decree 29308 "Standards for the Management and Execution of Donated Resources". This decree promoted alignment to the National Development Plan (PND), and registered and regulated the activities of official aid organisations and NGOs. These steps were instituted in a bid to avoid political and

ideological interference in the development policies of the country. While the Decree provides a clear basis for alignment, elements like the prohibition on outsourcing of services make it likely that disbursements will be slowed. The use of new aid instruments has however been limited though there has been a shift towards basket funding within various sectors. While the funding contributions of the traditional donors to specific sectors still remain significant, the government's approach and its lack of management capacity, especially for basket funding, has contributed to a dramatic slow down in the disbursement of funds.

At the same time, the government has been negotiating with emerging regional and other donors (Argentina, Brazil, Cuba, Venezuela, and Iran). These donors also share interests in the oil and gas sector, either as potential consumers or as fellow producers. These new donors generally do not subscribe to the Paris Declaration nor do they participate in aid coordination arrangements.

Progress and issues in relation to each of the PD Principles can be summarised as follows:

Country ownership

Bolivia was considered by the World Bank and IMF as exhibiting international *best practice* in the development of a PRSP process, on the basis of the national dialogues in 1997 and 2000 that sought to define public policies in a participatory way. This provided the basis for debt relief under the HIPC II initiative. Nevertheless, this process was much criticised by CSOs and NGOs who considered that it did not permit full citizen participation and because the PRSP document (the EBRP) was produced by the government alone, without waiting for the conclusions of the participatory National Dialogue. The EBRP also lacked an effective prioritisation of programmes. This lack of prioritisation prevented the definition of a pro-poor budget (covering both investment and public expenditure). The EBRP also made unrealistic assumptions about municipal capacity.

Despite the Dialogue 2000 process and the subsequent approval of the EBRP, this document in practice had little impact. Following the EBRP, there were various initiatives towards an integrated strategy, including poverty reduction and driven by development and growth. However, these never moved beyond document form as Bolivia struggled with extreme political instability. Amongst the most important documents were: The "Revised EBRP"², the "Productive Bolivian Development Strategy for the Reduction of Poverty (EBDP) Vision 2015 and the 2005-2007 Program"³, and finally the "Bolivia Competition and Support Plan"⁴.

During 2004 and part of 2005, the Productive Bolivia National Dialogue was developed, with the object of adjusting and validating the National Development Strategy and presented to the Consultation Group. A large number of actors formed part of this process, mobilising more than 70,000 people. This dialogue had four stages: Pre-dialogue – time in which groups of workers, industrial associations, cooperatives, women's groups and others developed strategies within their organizations. Later Municipal Meetings were held in 314 municipalities in the country, followed by nine Departmental Meetings with the participation of all the regional associations, prefects and civil bodies of the departments. The final stage was the National Meeting which sought to integrate the findings from the bottom-up dialogues.

² Presented at the Meeting of the Consultative Group October 2003 in Paris. It was not supported by donors because it was not considered to be based on a consensus with Civil Society. Days after the CG Meeting, and after violence which resulted in around 70 deaths, the President Sánchez de Lozada found himself forced into resigning and leaving the country.

³ Elaborated during the Presidency of Carlos Mesa, in 2004.

⁴ Elaborated during the Presidency of Antonio Rodríguez Veltzé, this strategy included the principal results of the process of the National Dialogue 2004-2005.

This hugely impressive public consultation exercise was overtaken by political events, with very little of substance rescued from this multi-stage dialogue despite the broad non-partisan support the PRSP enjoyed. The current PND (discussed in section 3 below) enjoys electoral legitimacy, based on the strong mandate given to Evo Morales in 2005; yet it does not develop issues raised in the National Dialogue, and is based on a very different ideological approach.

The current Government exercises a much greater degree of ownership of the policy and aid agenda than previous governments. It has successfully taken advantage of a situation of fiscal surplus as a product of income from hydrocarbons and also managed the engagement of new donors on the International Cooperation scene (including Venezuela, Cuba, and Iran).

Mutual accountability

Mutual accountability – both in the government’s relationship with civil society and with donors – is problematic within the current political context of Bolivia. There are several dimensions to this issue.

- The current government gained a clear electoral victory, which gives it unrivalled legitimacy in the National Congress. Its political programme addresses centuries of discrimination and social exclusion. At the local level, which has a high degree of autonomy following decentralisation reforms, opposition parties are in control of the non-indigenous regions and there is major opposition to the government’s political programme.
- The government’s programme for extending access to public sector services has evident support among its own constituents including social movements, trades unions and indigenous representatives. On the other hand, the Defensor del Pueblo (see below) has noted that other elements of civil society, notably the media, have been under greater restrictive political pressure.
- The current government’s dissatisfaction with the aid relationship (particularly over successive structural adjustment programmes) is well documented in its policy statements. The government considers that donors (and other development actors) ought to recognise Bolivia’s sovereignty over its natural resources and the legitimacy of its National Development Plan. The government is keen that donors be accountable for their efforts at alignment and harmonisation. It may seem paradoxical that the government has agreed to be a pilot country for the Evaluation of the Paris Declaration. However this is seen as a way of holding donors to account for failing to align with the PND effectively.

Alignment

The Morales Government expects donors to align with the PND and has recently produced a series of "Carpetas Sectoriales" (Sector Papers) for which it sought donor funding. However the sector papers generally lack a coherent sector plan that is both well-articulated with the PND and demonstrates a credible approach to implementation. In practice donors have sought to support specific sectoral policies with which they agree while making only limited use of the systems, institutions and mechanisms of the State.

Donor-government dialogue is supposed to be structured around five round-table discussion groups: the Bolivia Digna [Bolivia with Dignity] (social) Group, Productive Bolivia (productivity and competition) Group, Democratic Bolivia (institutions) Group, Macroeconomic Group and the Harmonisation Group. However these roundtable groups (including Bolivia Digna which focuses on the core social objectives of the PND) are not functioning effectively as government has in practice favoured bilateral over multilateral dialogue. A clear example of this is that the Harmonisation

Bolivia Case Study

Group, a basic part of the mechanism of coordination between donors and the Government, has met only twice so far during the period of the Morales administration.

Harmonisation

The Group of Partners for the Development of Bolivia (GruS) is the principal mechanism for harmonisation between aid agencies in Bolivia. It is supposed to support the government-donor dialogue through the roundtables to improve aid effectiveness and alignment in pursuit of the objectives of the PND and the Millennium Development Goals (MDGs).

Despite the lack of government interest in taking forward the roundtable groups, the GruS has worked to elaborate data on donor operations in fourteen sectors. Following Decree 29308 it remains to be seen if Government will be more proactive in this process. Additionally, within the framework of the Code of Conduct promoted by the European Union, the members of the GruS have carried out a self-diagnostic exercise. This envisages, amongst other things, the establishment of leading donors in the sectors according to their comparative and competitive advantages, donors focusing on no more than three sectors, and delegated cooperation. There has been little progress in harmonization between multilateral agencies.

There are active GruS groups on social issues, most notably on Gender (which has produced an overview of donor support for gender equality including reviewing the use of basket funding support), Indigenous People (collating information on relevant donor programmes) and Justice (focusing mainly on the judicial sector).

Managing for results

Although the National Development Plan provides a potential focus for a common results framework, the focus of donors and government has tended to be on operational rather than on development results, particularly in relation to public financial management. In the case of the government,⁵ issues of gender and social inclusion are integral to the National Development Plan (PND) and the government needs to show the impact on development at the community level. In the case of donors, especially those involved in basket-funding, there is a need to show overall development results and the contribution made by the donor to these achievements

⁵ Team discussion with VIPFE.

3 Context: Human Rights, Social Exclusion, Gender Equality

Successive governments in Bolivia have adopted a rights-based discourse to the pursuit of social goals and the achievement of social justice. The present government's commitment to an "indigenista" political philosophy and redistributive agenda provides the basis for tackling social exclusion of the majority indigenous population through rights fulfilment. The cultural relativism implicit in this indigenous philosophy presents a significant risk, however, to donor frameworks for gender equality, based on international human rights standards. Meanwhile, the Evo Morales strategy of renationalisation and communitarianism (see also Box 2.1), combined with a suspicious civil society steeped in anti-globalisation and anti-capitalist advocacy, politicises the somewhat technocratic Paris Declaration principle of country ownership by asserting national policy sovereignty and rejecting donor neo-liberal policy norms.

3.1 The role of civil society

The NGO sector in Bolivia emerged in the era of dictatorship during the 1970s, as pockets of resistance to dictatorships (Banzer 1971-1978, García Meza, 1981-1982), with agendas above all based on the political objectives of democratization. Once an effective representative democracy based on political parties was for the first time in national history established between 1982 and 1985, these NGOs effectively underwent an identity crisis. The creation of representative democracy emerged simultaneously with the application of structural adjustment reforms and the development of neo-liberal policies, which became a focus for civil society opposition.

Many NGOs, with strong international financing, particularly from Europe and America, dedicated themselves to empowering civil society, social movements and new actors on the social scene and, at the same time, opposed neo-liberal policies. These NGOs, along with other civil society organisations, were adversaries of the political parties and many institutions of representative democracy such as Parliament and the Judiciary. They have participated in international networks, along with anti-globalisation and anti capitalist movements, human rights movements or ethnic visibility movements. The NGOs cultivated a close relationship with the Social Forums at Porto Alegre.

The actions of the NGOs are inseparable from those of civil organizations. Both were opposed to dictatorship, but focused on grass roots democracy, unions and social movements, while remaining suspicious of the mechanisms of representative democracy, particularly political parties. They have also been opposed to the policies associated with structural adjustment and the role of international aid in promoting and supporting these policies.

In this context, the Paris Declaration agenda is regarded by many civil society organizations with suspicion (as involving new forms of conditionality). The preferred paradigm for aid is one that involves direct social participation in decision-making processes, in the administration of resources, in the implementation of policies and the grass roots monitoring of programmes and projects in the context of strong national sovereignty.

3.2 Human rights

Bolivia has signed the Universal Declaration of Human Rights and has ratified the International Pact (1967) of Economic, Social and Cultural Rights and the American Convention (1969) on Human Rights (Pact of San José). Bolivia is also a member of the Interamerican Court of Human

Rights. However, the vision of human rights that informs the current government's policies has different origins.

In 2006 the new Government presented its National Development Plan which aspired to remove the inequality and exclusion that “oppress the majority of the Bolivian population, particularly of indigenous origin...” (Agencia Boliviana de Información). The Plan presents a radical vision of Bolivia, reclaiming the rights of indigenous communities. Based on 2001 census figures⁶ showing that indigenous Quechua- and Aymara-speakers are 55% of the population while mestizos are 30% and whites 15%, the Plan puts the rights of indigenous peoples at the centre of its vision for Bolivia. The plan views inequality as the negation of rights of people and groups. To achieve this vision, the Plan aims to dismantle colonialism and neo-liberalism and to construct a multinational and communitarian State that empowers social movements and emerging indigenous peoples. The chapter on Democratic Bolivia aims to reorient the structures of power, to achieve better management and transparency by giving more direct control to the indigenous communities.

This vision of rights leads directly to the concept of social inclusion. The plan does not just aim to include the excluded groups in development but to dismantle the colonial structures that marginalised them. This vision is followed up in the Plan by a chapter on Dignified Bolivia which sets out arrangements for the eradication of poverty and inequality by arriving at an equitable distribution of resources. It also sets out plans for social development, including unrestricted access to social services for the excluded populations.

The Plan speaks of Sovereign Bolivia in which the State is a sovereign actor around which international economic relations are redrawn. This vision strongly emphasises the Paris Declaration agenda of ownership with implications for the way in which aid donors should align their programmes and harmonise their activities. The vision also refers to the role of international companies in the development of Bolivia and restructures their relationship to the State.

The Plan bases itself on a particular view of human rights. It proposes to transform the colonial, neo-liberal and patriarchal State into a communitarian State where women, different generations and people of different capacities can fully exercise their rights without discrimination, exclusion or violence. While the Plan seems to be informed implicitly by Bolivia's international human rights commitments, it does not explicitly set its vision within such an international framework. Instead of being concerned with international framework of human rights, it appears to be a matter of principle to set the vision of human rights within an indigenous and communitarian framework.

The Defensor del Pueblo established in 1997, is the main organisation in Bolivia charged with promoting and protecting human rights.⁷ In reviewing the situation in 2006⁸, the Defensor highlighted four main events that affected human rights in Bolivia:

1. The new government elected in 2005 has made a priority of the political participation of indigenous peoples, which has the support of numerous social organisations. The office noted

⁶ There is some dispute about the basis of these Census figures. See Section 5.1 for further discussion of the way indigenous groups are integrated into the PND.

⁷ The Defensor del Pueblo is not mentioned in the National Development Plan, which is concerned mainly with the work of public sector organisations. The Defensor is independent, reporting directly to Parliament. Further discussion of the Defensor is at Section 5.2.

⁸ Defensor del Pueblo 2006 *Informe IX del Defensor del Pueblo al Congreso Nacional*. (Report IX of the Ombudsman to the Parliament). This was the last year of the Five Year Plan 2001-2006.

that, while the new government had a clear electoral majority, this was not sufficient⁹ to make constitutional changes without the support of other parties.

2. The referendum on the autonomy of Bolivia's regional departments gave further emphasis to the process of decentralisation in the country.
3. The election of a Constituent Assembly will have profound effects on the political process. Both of the latter events were marred by some political conflict. The annual report 2006 comments on the ongoing political process, the increasing political antagonism, the conflict between the national government and local government, and the racist and regionalist expressions in the conflict.
4. The establishment of new contracts with the companies that operate in the oil and gas sector (hydrocarbons) also had implications for human rights – the collective right of Bolivians to exercise sovereignty over the country's natural resources.

In considering progress with specific rights, the Defensor outlined progress with social rights as the government proceeded with its plans to address issues of social exclusion and discrimination. Evidence includes the action to establish a just wage for all Bolivians, the fight against illiteracy, financial grants to all children up to the 5th grade of primary school, various improvements in child benefits,¹⁰ vaccination campaigns, a new security payment for the elderly (to replace another). Some of the proposals of the government have been controversial, provoking opposition, including plans for a modification of the 1996 Land Reform that will redistribute land and affect the rights of established enterprises and for the reform of the 1994 Education Law (see below).

Regarding civil and political rights, the Defensor notes that there has been some backsliding during 2006. The Permanent Assembly of Human Rights in Bolivia noted government limitations on the liberty of expression, with acts of aggression against the Press; intolerance towards differences of political opinion; discriminatory and racist attitudes; impunity regarding deaths resulting from social and civil conflicts; and lack of action when human rights had been violated. The Defensor's 2006 Report provides detailed evidence in all these areas.

3.3 Social exclusion

The government of President Evo Morales has three conceptual sources that feed its thinking and its attempts to design public policies:

- A Marxist influenced vision of some form of 21st century socialism;
- Ideas of revolutionary nationalism of an anti-imperialist type (stemming from the 1952 Revolution), which place the corporate State at the centre of the economy; and
- Ideas about the role of the indigenous, putting ethnic and cultural subjects at the centre of its thinking. The discourse of Bolivia as an indigenous country, and the social exclusion of the indigenous majority, is central to the political programme of the government.¹¹

⁹ The Constitution requires a two-thirds majority in Parliament to make changes to the Constitution.

¹⁰ Increase in the amount of Seguro Universal Materno Infantil (SUMI) and the age of the mothers who benefit is increased to 60 years.

¹¹ Many of the substantive ideas about indigenous Bolivian culture reflected in government thinking stem predominantly from the Aymara culture, and therefore do not embrace all indigenous Bolivian cultures. In the 2001 Census, 60% of those surveyed perceive themselves as belonging to an indigenous or native people. However, key problems with the Census included the lack of any option to say whether an individual saw themselves as being of mixed race or Bolivian. Additionally, there were only five choices available for identification with a native community. These issues were particularly problematic given that much research

At its core, the National Development Plan aims to fight against social exclusion, especially of native and indigenous communities and peasant farmers. The PND proposes the construction of a plurinational and communal State of an indigenous type which builds bridges between the communal and the private economy. The State continues to be at the centre of this construct, and has the responsibility for handling the instruments for public expenditure and orienting the development of all economic sectors. In its treatment of the rural situation, the PND emphasises small producers, in particular the community development of indigenous populations. It proposes a role for the state that is very active in rural development and the fight against poverty, all the while privileging indigenous people.

Rural poverty is more intense than urban and it is in the countryside where one can see the most acute marginalisation of native and indigenous populations. However, many of the measures proposed are not so different from those implemented by previous governments. These measures achieved poor results, which does not inspire confidence in the current government's plans. There are however two major differences from previous plans: one is the priority focus on the small producer and particularly the native producer. The second is the drive towards community and collective approaches, of questionable relevance for the lowlands where farming exists as a business.

The determination of the government to correct the injustices and inequality that have deformed Bolivian society for centuries is noteworthy. The government has the full support of the public sector, a stable macro-economy, and an economic boom owing to the increase in the price of hydrocarbons and minerals exports. This has given the government some fiscal space in which to pursue its vision.

3.4 Gender equality

Gender equality has improved during the last twenty years and performance against the MDGs shows some improvements in health (reductions in maternal mortality) and education (girls' enrolment). However as shown in Annex B, maternal mortality remains high by regional standards and inequalities between indigenous and non-indigenous women are greater than for men.

Many of these improvements that have occurred are the result of changes in the Bolivian economy and society rather than as a result of government policies. In particular, Bolivia has been urbanising rapidly and women have increasingly entered the labour force, which has had major effects on the distribution of intra-household income. Much household income now comes from small businesses managed by women, which has had a positive impact on children's education and health. Men still look for paid employment, which may be less secure. There has been an increase in domestic violence occasioned by the underemployment of men, economic independence of women, and alcoholism. Improving political participation of women is indicated by trends in parliamentary seats. The proportion of women holding seats in Parliament more than doubled from 7% in 1995 to 19% in 2005. While, in 2006, the proportion of women in Parliament declined slightly to 17%, the current government has, encouragingly, appointed indigenous women to Ministerial posts.

The Morales Government has expressed its commitment to the full exercise of women's rights and the National Development Plan includes gender equality implicitly as part of a wider agenda of equity across society and the transformation of a colonial, patrimonial and neo-liberal system. While the NDP focuses on the need to address violence against women, the NDP in general does

shows that 66% of the Bolivian population see themselves as mixed race or as Bolivian, and no more than 18% claim to belong to one native people.

not articulate policies specifically to address gender equality issues, and there was some discussion among those interviewed for this study as to whether this concept is of real interest to the government and whether the cause of gender equality was in practice receiving less prominence. Some argue that the Aymara cultural concept of the roles of men and women in traditional society (*chaha warmi*) that is emphasised in the PND is not necessarily favourable to gender equality. The Vice Ministry of Gender has however developed a strategic plan in consultation with civil society organisations that emphasises five thematic areas: violence, health, education, political participation and economic productivity, and cross-cutting themes including cultural identity, follow up to international conventions, communication and monitoring. There is also an intention to move away from treating women as a “vulnerable group” towards more effective policies to mainstream gender throughout government including through Departmental Gender Units (GruS, 2007).

Donors have shown a willingness to harmonise behind gender equality goals. Several donors have also contributed to the Gender Equality Basket Fund, although the level of resources provided has been much lower than the Vice Ministry had hoped (GruS, 2007). This fund supports the efforts of the Government of Bolivia to reduce gender inequalities across the country by contributing to a common fund (pooled funding) with bilateral donors including Canada (CIDA), Denmark, the Netherlands, and Sweden.¹² According to CIDA:

“The common fund was developed and created to support the implementation of the Government of Bolivia's strategic plan for the full exercise of women's rights. The fund promotes gender equality and equal opportunities for women and men in access to resources and sustainable development benefits. At the same time, it helps women exercise their full economic, social, political, and cultural rights within an ethnically diverse society. By doing so, this project contributes to the institutional strengthening of the Vice-Ministry of Gender and Generational Affairs and to mainstreaming gender within the Government of Bolivia.”

However, it is generally agreed that the Vice Ministry of Gender is weak and faces major challenges in mainstreaming gender in different sector policies and programmes. Donors therefore try to have an influence in mainstreaming gender directly into sector programmes.

¹² There is currently no “lead donor” on gender, though a process of agreement of lead donors with government is under way.

4 Case Study Examples

The criteria for selection of case studies for more detailed examination reflected both the availability of information and the potential of the examples to provide insights into the interaction between the aid effectiveness agenda and rights, social exclusion and gender equality. In a context where the aid effectiveness agenda is not well advanced, the range and depth of possible case study examples was limited. The examples selected were the following:

- Support to the office of the Defensor del Pueblo. This example was selected because of the key role of the office in the protection of human rights, and the use of basket funding arrangements by donors providing support.
- Support to the Education Sector. There has been a promising initiative to establish a sectorwide approach supported by basket funding arrangements for the education sector. Although there have been significant achievements in improving gender equality in education, the sustainability of reform initiatives has been undermined by a perception that the reform strategy did not address the social inclusion concerns of the current government.
- Extending rights of access to Basic Sanitation. The Bolivian government has set out a strong commitment to improving access to water and sanitation services in the PND as part of its programme to address ethnic and regional inequalities in access. However, initiatives to move towards a sectorwide approach in support of this objective have been hampered by institutional weaknesses as well as lack of agreement on key aspects of sectoral policy.

4.1 Promotion of human rights by the Defensor del Pueblo

In 1994, the Bolivian Constitution created the office of the Defensor del Pueblo (Defender of the People, sometimes known as Ombudsman), which was fully established in law in 1997. The office is completely independent of the State's executive powers and it reports annually to the Congreso Nacional (Parliament). As well as being a recognised part of the Bolivian system of justice, the office has international recognition and support from the Interamerican Commission of Human Rights. In 2006, the Defensor opened offices in each of the nine regional departments of Bolivia so that its services could be more easily accessed.

The role of the Defensor is to defend people's human rights against the decisions and actions (or omissions) of all public sector organisations at national and local levels, including co-operatives and private organisations that provide public services. In the role of Ombudsman, the office takes up the complaints of citizens against the abuse of public powers. The office also has the responsibility to promote human rights, for instance when laws are being drafted. The Defensor has operated according to a Five Year Plan 2001-06 and has recently agreed a new Strategic Plan for 2007-11. The Five Year Plan 2001-06 was oriented towards constructing a culture of respect for human rights and the Defensor, in the work on behalf of citizens and with different social organisations, contributed to the knowledge of the marginalised and vulnerable about their rights. In the period 2007-11, the intention is that the office will achieve substantial results in diminishing the violations and arbitrary decisions of the State. The Plan sets out a results framework for strategic programmes and projects.

As well as following up citizen's complaints and pursuing specific international cases, the Defensor office has responsibility for the victims of the political repression in Bolivia during the period 1964 to 1982 and exercises special responsibilities to protect and promote the human rights of six specific groups: women, children and adolescents, the elderly, the disabled, people deprived of liberty (prisoners), peasants and indigenous peoples. Here we would like to highlight the work for three of these groups. The work of the Defensor for women has included: (i) concern for the

regulation of wages paid by companies to home workers; (ii) investigation of the health of sex workers; and (iii) investigation of the way budget cuts in local government had impacted on gender units. More positively, the office has also helped to reformulate the law on Domestic Violence and has been working to promote greater understanding and awareness of domestic violence within the police and the military, so that domestic disputes are handled with more sensitivity to the needs of women and children. With regard to the disabled, the Defensor has helped to promote the National Plan on Equality and Equal Opportunities. It has helped to strengthen local government provision for the disabled and has followed up its recommendations about the integration of disabled students into education establishments. Regarding the work of the Defensor for indigenous peoples, the office has been involved in discussions of how one group (Yuki) might disappear as its culture is completely absorbed into the dominant group. The office has also considered how the rights of indigenous peoples might be incorporated into the Land Reform, and has been negotiating with companies about the complaints by specific groups regarding sanitation and water contamination.

The work of the Defensor in 2006 was financially supported by the National Treasury (51%) and aid funds (49%). According to the Defensor¹³, the national funds mainly pay for local salaries while the aid funds provide support for the programmes and projects. The majority of aid funds¹⁴ (Belgium, Canada, Denmark, Netherlands, Sweden and Switzerland¹⁵) have been organised in a basket managed by the Central Bank, which helps promote harmonisation and alignment. For example, the Annual Report served the information needs of all the funding agencies. The member donors of the basket discussed and agreed the orientations of the Strategic Plan for 2007-11.¹⁶ This Plan sets out five major programmes (19 projects) to protect and defend human rights, to monitor public policies, to prevent social conflicts, to educate and build capacity regarding human rights. There are also three cross-cutting themes on civil and political rights, social, economic and cultural rights, and human rights in the context of the Constituent Assembly.

The supporting donors have found that basket funding is an effective mechanism to fund the programme of the Defensor del Pueblo, in line with the Principles of the Paris Declaration. Yet, despite the satisfaction on both sides with the programme and the effectiveness of the basket funding, the aid relationship is likely to change in future. On the Bolivian side, the Defensor believes that the Bolivian Treasury should be showing more commitment to the important human rights activities by providing funding for the programmes not just for the staffing and establishment.

Donors have had to reconsider their role within the basket funding arrangements for several different reasons, which may or may not have anything to do with the orientation of the programme. Donors can face internal administrative difficulties which may force a change in their strategy. For example, Switzerland is revising its country strategy to reduce the number of activities and also to achieve more visibility for the promotion of Swiss objectives, such as gender equality. While the basket helps with the first objective of focusing on fewer activities, there is some concern that the next Strategic Plan may not give as much attention to gender as the previous plan.¹⁷ Nonetheless, by participating in the basket the Swiss are remaining in the sector

¹³ Interview in La Paz.

¹⁴ The UN High Commission for Human Rights has given support for some activities and UNICEF has supported the programme for children and adolescents. The Special Fund for Ombudsmen in Latin America and the Caribbean has also given support. The UK and Switzerland also have separate funding.

¹⁵ UNDP is also a member of the basket funding from 2007.

¹⁶ Defensor del Pueblo 2007 **Plan Estratégico Institucional 2007-2011: Síntesis**.

¹⁷ While the new Strategic Plan does not have a specific programme or project, the issue of gender arises throughout the Plan. Attention to vulnerable population groups, including women, remains a major principle.

dialogue and can therefore help to ensure proper attention to gender equality, and they will continue to fund projects in parallel (possibly through Swiss NGOs) so that they maintain a visible presence in the field. One such project is a cultural activity designed to unite different actors who were involved in a violent confrontation in one community.

DFID had been involved in the basket funding until 2005 but budget cuts in Latin America led to a reorientation towards regional activities, so now DFID supports the Defensor's horizontal activities with Colombia and Guatemala. Donors are increasingly under pressure, including as a result of the Paris Declaration, to reduce the administrative burden they impose on partner governments. In this context, basket funding provides an incentive for donors to reconsider what they are contributing to the programme as a whole. If a donor feels that its comparative advantage lies elsewhere, there is little incentive to remain in the basket. One result of this attrition of the number of donors involved in a basket funding arrangement could be increasing visibility for the donors that remain.

4.2 Support to the education sector

The UNDP's 2007 Human Development Report for Bolivia¹⁸ highlights several different educational changes over 20 years, particularly the increasing emphasis on indigenous cultures. Education reforms have been taking place through a period of five presidencies, underpinned by other policy changes on popular participation¹⁹, decentralisation²⁰, and administrative modernisation of State institutions. In 1992, the National Congress of Education considered that education would help create a democratic State born from historic and cultural roots and therefore aimed to strengthen national consciousness of culture, gender and region. The 1994 Educational Reform Law established that primary education should be universal and free. It also guaranteed equal rights of women and men and aimed to construct an intercultural education in which all Bolivians could participate. The Law of Decentralisation created a situation in which the central Ministry of Education shared responsibilities for education with the local Prefectures, which also has the effect of empowering local cultures and communities. The creation of the Directorate of Bilingual Intercultural Education in 2004, with support from Denmark, gave further emphasis to the intercultural trends with education in all national languages (Aymara, Chiquitano, Guarani, Moxeño, Quechua, and Spanish). The UNDP Report also highlights several other strategies to extend social inclusion and intercultural trends.

The framework for support to the education sector was, until the 2005 election, guided by a Memorandum of Understanding with donors to support a multiannual work programme (POMA) covering the period 2004-8 and establish an Education Sector Support Fund (FASE)²¹ as a principal funding mechanism to support the overall Education Reform Programme (PRE). The PRE set out an overall framework for education sector reform aligned to the MDGs. The objectives were:

For example, the Ombudsman has been considering how the Constituent Assembly intends to treat the human rights of women

¹⁸ According to UNDP 2007 National Report on Human Development **El estado del Estado en Bolivia**. Chapter 4 takes the Education sector as an example of the changes to the State.

¹⁹ The Law of Popular Participation in 1994 made the municipal governments important actors in the Bolivian State.

²⁰ The Law of Administrative Decentralisation in 1995 gave important powers to the regional prefectures.

²¹ Basket funding involves Denmark, the Netherlands and Sweden. The structure of the education sector, with NGOs and the Church managing schools, provides opportunities for both basket and non-basket donors to give support to education through various mechanisms.

- Improving quality in the national education system through establishing management by results.
- Promoting the participation and responsibility of the organs of popular participation and society in the management of educational policies.
- Improving quality and access to the National Education System for the socially excluded.
- Improving infrastructure and equipment of the National Education System.
- Developing and articulating a curriculum that can be applied in all parts of the National Education System.
- Improving the quality of training and performance of teachers, as part of an integrated system of higher education and personnel administration.
- Strengthening capabilities for scientific research, development and technological innovation in the context of sustainable human development.

Under the memorandum of understanding, the Ministry of Education and donor agencies agreed procedures for consultation and decision-making, disbursement mechanisms, monitoring and reporting, evaluation, audit, financial management and information exchange.

The PRE had a number of strengths including strong leadership by the sectoral ministry and clear sectoral policies and procedures around which harmonisation and alignment could proceed. During a period of political instability from 2003 to 2005 the creation of a common basket for donor funds in the education sector required agreement of the Ministry of Finance and new arrangements for reporting and auditing. This reform has been leading to increased alignment with government policies, harmonisation of donors and greater emphasis on evaluation of results. Initial problems in implementation included the following: budgeting tended to be based on past funding patterns rather than the sector strategy, the PRE did not command cross-party political support (leading ultimately to the abandonment of the reforms), municipalities lacked capacity to manage investments, and evaluation mechanisms remained weak. In addition there was a heavy reliance on technical assistance.

The programme was significantly affected by the 2005 election. The current government intends to change the direction of education reform, which is considered to have led to a large investment of resources but, according to the government, little impact on results. There were several factors underlying the calls for policy change, of which one was a dispute between the government and the churches, especially the Catholic, regarding the role of religious and moral education. There was also a rumour that private schools were to be suppressed. The current government does not believe that the reforms have resolved issues of regional inequalities in access and social exclusion, and may have exacerbated them. The PND does not show how these issues will be addressed, although the Education Ministry is considered by donors to have an effective capacity for implementation.

Despite these concerns, there have been significant improvements in gender equality in education over the past fifteen years. Improvement to school transport has been one factor while grants to parents to keep their girls in school have also had the desired effect. The government is considering extending the grants to the poorest children, regardless of gender.

A Gender Equality Basket Fund supports the Viceministry of Gender, charged with reducing gender inequalities across the country. Unfortunately, this Viceministry has little influence on sectoral departments and limited capacity to carry out its role at the community level. It was necessary for donors seeking to promote gender equality in education to take specific action within the Viceministry of Education. This action has involved setting gender equality objectives,

establishing a results framework including monitoring indicators and mechanisms, and capacity building. It required a donor to act as a champion.

The Dutch (as one of the main bilateral donors to the sector) have seen opportunities in the Ministry of Education's interest in promoting girls' education and assessing the extent to which girls have benefited from the policy changes (such as grants for girls). The Dutch have made use of this situation to align behind the Ministry's programme and to promote gender equality within the education sector. The Dutch programme requires the setting of specific objectives, with the government and other donors, and determining the results to be achieved. The Dutch support a Bolivian expert in the Ministry to develop the strategic objectives and results. The Dutch also make use of an NGO (Fundación Autapo) to undertake capacity building for promoting gender equality in the education sector. They ensure that Embassy staff make visits to the communities along with Ministry officials to see projects and also use other NGOs (such as OXFAM) to undertake reality checks in the sector. While the basket funding does pose a challenge in terms of visibility of results attributed to the Dutch efforts (which is important for the Dutch Parliament), the Embassy officials in La Paz have handled this by focusing on making visible the results of the government programme for promoting gender equality (and broader social inclusion) and the contribution of the Dutch effort to achieving those results.

The education sector is one in which there have been some significant achievements in improving gender equality and in moving towards more strongly harmonised and aligned donor support around a national programme of sectoral reform. The lack of bipartisan ownership of the reform agenda, and in particular the perception that educational reforms were not addressing the concerns of the current government about the social exclusion of the indigenous (and especially rural) population has however undermined the prospects for progress through the sectoral mechanisms that had been successfully developed.

One of the main lessons from the Education sector is that, by focusing on the results framework, considerations of gender equality can be integrated effectively into the programme. The sector programme set a clear results framework with objectives, basket-funding arrangements, gender-disaggregated monitoring indicators, and technical support to the Ministry of Education. At the same time, donors need to recognise that they can only expect to show their contributions to the results of the whole programme, without attributing specific results to individual donor interventions.

Three factors lie behind the integration of gender equality into the education programme. (i) The PND already sets out overall objectives regarding social inclusion and gender equality. (ii) The programme design required one donor (the Netherlands) to champion the issue of gender equality in programme design. (iii) The sustainability of the programme's attention to gender equality relies on capacity strengthening within the Ministry of Education and the various service providers.

4.3 Extending rights of access to basic sanitation

According to the National Institute of Statistics (2001) 37% of Bolivians do not have access to sanitation while 38% do not have access to piped water supplies. These overall figures mask regional inequalities (See Annex Table B.1). The highland regions (Occidente) are those worst served by sanitation and the lowland regions (Oriente) have greater access to piped water. As the highland area is associated with indigenous peoples, there is a perceived ethnic as well as a regional inequality in the provision of water supplies and sanitation. It is therefore consistent with its overall vision for the government to plan to extend coverage of these services to the population, the emphasis being on the highland areas.

The PND dedicates specific investments to the area of water and sanitation "Water for the people". The document proposes structural changes with respect to the political direction of previous governments, the most significant of which are the concept of water as a human right and the promotion of the greater participation of the State in the management of water and sanitation services. In terms of future projections and the development of the Millennium Objectives, the Government proposes a series of very ambitious goals, which are: to take drinking water to 1.9 million inhabitants and sanitation to 2 million people (2006-2010). In this way it proposes to raise to 1.3 million the number of people to whom sewage treatment is available (goals indicated in the PND).

These goals must be achieved via a very significant increase in investment in the sector, to a total of 657 million Bolivianos (about USD 82 million) in the period 2006-2010, reaching 9.6% of public investment in water and sanitation. This ambitious program is faced with a number of problems around institutional ability at central level and continuity of management.

The existence of a number of institutions and processes seemed to be signalling a remarkable advance towards a SWAp in the Basic Sanitation Sector up until February 2005. In particular these included:

- An adequate institutional framework and a management model;
- Specific mechanisms for assigning resources;
- A policy of Institutional Strengthening;
- An expenditure plan;
- Articulation of an overall policy framework and a set of sectoral strategies; and
- The availability of mechanisms of coordination with International Cooperation and other entities in the sector that are led by the sector.

However existing weaknesses within these institutions and processes rendered many of these advances ineffective. The Bolivian Government did not have adequate mechanisms for evaluating management. In addition, it did not have multi-annual budgets for expenditure. Adequate participation in the development and socialisation of the sector's plans and programs had not been achieved. To advance the development of a SWAp, the sector still had to move from establishing standards and policies to effective implementation. It has therefore not been possible up till now to translate the creation of the Ministry of Water into the development of a strategy integrating the different government actions in irrigation, reservoirs and basic services. On the other hand, the specific sector of water and sanitation has suffered gravely from the problem of lack of institutional continuity (three Vice-ministers in 1½ years) and of lack of coherence between the central level and the prefectural and municipal units. These levels of government have not been aligned with new governmental policies and continue to operate in a form that is inefficient and contrary to the new Government's proposals. As a result, donors are still continuing to support separate programmes rather than moving towards a sectoral approach.

At the same time, there has been uncertainty about the overall approach to the role of the private sector in the water and sanitation sector. During the 1990s a reforming government in Bolivia adopted a policy position of capitalizing state enterprises. In 1991-1997 the World Bank funded a \$35 million urban water rehabilitation credit for the water supply and sanitation utilities of three major Bolivian cities: La Paz, Santa Cruz, and Cochabamba. A condition of loan was a tariff increase to sustainable levels, in an institutional context characterized by political interference in tariff setting, keeping tariffs unsustainably low. Pro-reform actors in national and municipal government were initially successful in pushing through reform, with 30-year concession management contracts for these municipalities arranged. Private sector participation was,

Bolivia Case Study

however, overturned under widespread and well-organised popular protest leading ultimately to the forced handover of water supply concessions in La Paz and El Alto to a newly created “municipal and social” water and sewerage company on 3 January, 2007. This protest included opposition from middle class consumers, informal water vendors and poor consumers facing high connection charges. The Minister of Water in the Morales government was a prominent leader of the protests.²²

²² See OPM and WB (2008).

5 Findings

The Bolivian government has set out a development strategy that focuses on addressing social exclusion and the collective rights of peasant farmers and indigenous peoples. Commitment to social goals is therefore absolutely central to the government's programme and this commitment reflects the views of substantial elements of civil society. These elements of civil society have also been strongly critical of the effects of foreign interference and in particular of the role of international financial institutions and bilateral donors in promoting neo-liberal reforms under structural adjustment. The Paris Declaration is viewed with suspicion as potentially a new form of conditionality. The Bolivian government wants donors to align around the National Development Plan but has preferred bilateral to multilateral processes of dialogue and it has sought to reduce dependence on aid especially from traditional donors. There has however been some progress in developing the role of the Group of Partners for the Development of Bolivia (GruS). At the same time, the government's programme and underlying philosophy is strongly contested by other elements of Bolivian civil society and by the opposition which controls many local governments, and the government's human rights record has been criticised. Political unrest and uncertainty have militated against effective implementation of the NDP.

The limited progress in taking forward the aid effectiveness agenda, and the political difficulties that have impeded implementation of the government's programme, mean that specific findings in relation to the interaction between the aid effectiveness agenda (for instance through the use of new aid instruments) and social issues are few. The case studies do suggest the following:

- ***Donors have successfully supported the strengthening of accountability processes and structures through support to the Defensor del Pueblo.*** This has demonstrated the potential for effective action on human rights where there is agreement over policies and sufficient institutional capacity and shared political commitment to specific social objectives. This support has however to some extent been under threat from changes in donor priorities and budgets.
- ***The weakness of the Viceministry of Gender has required the use of additional sectoral mechanisms of support despite the existence of a basket funding arrangement for gender mainstreaming.*** Specifically, additional initiatives (particularly from the Dutch) have been required to further gender equality in the education sector.
- ***Moves towards sectorwide approaches in education and water and sanitation have shown promise in helping to further particular social goals, but progress has stalled*** as a result of lack of agreement on key aspects of policy (within different levels of the Bolivian government and with donors) and problems relating to institutional capacity in government to carry through highly ambitious programmes in a charged political atmosphere.
- ***Basket funding arrangements have helped to further donor support for social goals*** and have to some extent encouraged harmonisation and alignment, although there remain challenges for some donors in being able to attribute results so as to respond to domestic accountability concerns. The Bolivian government is seeking alignment around the NDP but has not sought to move away from project-based funding reflecting the desire to maintain aid relationships primarily on a bilateral basis, especially with non-traditional donors (like Venezuela).

6 Conclusions

The following conclusions arise from overall reflection on the context and specific examples analysed in Bolivia. Conclusions are presented as pointers from experience, rather than in the form of recommendations, given that the evidence base is restricted to only one country. Conclusions are grouped according to categories of the Paris Declaration principles. Inevitably, some reflections touch upon a number of these principles and the categorisation below is intended to be indicative, rather than definitive.

Country ownership and mutual accountability

Bolivia's recent experience illustrates starkly the difficulties donors can face in a situation where a legitimately elected government has a strong commitment to a programme that is driven by ambitious social goals, but where the form these goals take and the approaches proposed to further them are hugely politically contentious. While there is vigorous debate about whether the government focus has eroded attention to civil and political rights and gender equality, donors have in principle aligned with the National Development Plan. However, in both the education and water and sanitation sectors there are significant disagreements over important issues relating to the approaches proposed for taking forward government objectives, and it remains unclear how these will be resolved.

The experience also shows that the PD principles can be strongly contested by both a government and by civil society organisations that are committed to social objectives. Dissatisfaction with the record of aid in Bolivia has led to a suspicion in government as well as in important elements of civil society about the forms of mutual accountability that the Paris Declaration envisages. These are seen as potentially limiting both sovereignty and ownership, and undermining accountability to the ultimate beneficiaries of aid. Despite this, there is continuing engagement by the Bolivian government with PD processes which may provide an opportunity for confidence building.

Donors need to find ways of maintaining dialogue and engagement (with government and civil society including both advocates and opponents of current policies), although the prospects for taking forward a more ambitious aid effectiveness agenda are limited by the current political tensions, as are the prospects for effective action to take forward the ambitious government social agenda. The continued engagement with PD processes (such as the country evaluation of the PD and the continuing operation of the GruS) does provide an opportunity for such dialogue and confidence building.

To fulfil these commitments effectively requires a strengthened capacity to operationalise a socially progressive policy framework. This means capacity building for integrating social *goals and processes* of rights fulfilment into programme design. Most interlocutors agree that the government of Bolivia – including its Ministers and Ministry officials -- presently does not have the capacity to implement its philosophical commitments effectively. At the same time, the government's programme is contested within the polarized political system.

Harmonisation and alignment

The Bolivian example provides only limited evidence on the harmonisation and alignment agenda in relation to social issues. Basket funding arrangements have shown potential for improving the effectiveness of donor support in specific areas. There was significant progress in moving towards sectorwide approaches that have incorporated social goals, but these have at least partially stalled as a result of policy disagreements and uncertainties about proposed approaches for implementing government programmes, despite a general willingness of donors to align on the National

Development Plan. There has been some progress in the harmonisation and alignment agenda through the mechanisms described in section 2.2, but there has been little specific focus on social issues in these processes.

Managing for development results

There has so far been little progress in strengthening the focus on results of aid. There is scope for progress here since the government also wishes to show results to its supporters. As a result an intensified donor focus on results should not be regarded as an unwelcome conditionality, especially when the results required concern the collective rights of peasant farmers and indigenous peoples and effective ways to address social exclusion. There is a particular opportunity for donors to focus on strengthening the technical capacity within government to conduct social analysis of policy outcomes and impacts, and to support monitoring instruments that generate socially- (including sex-) disaggregated quantitative and qualitative data, measuring social progress towards politically-endorsed rights fulfilment goals.

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List of people met

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Victor Hugo	Bacarreza	MDG's Programme Coordinator	United Nations Development Programme – Bolivia
George	Gray Molina	Human Development Advisor	United Nations Development Programme – Bolivia
Jennie	Richmond	Head	United Kingdom Department For International Development - DFID Andes
José Manuel	Mariscal Arroyo	General Co-ordinator	Spanish Agency for International Cooperation AECI – Bolivia
Gover	Barja Daza	Director -Masters for Management and Public Policy – Masters for Development	Bolivian Catholic University
Dominique	Favre	Resident Director - Chief of Cooperation	Suisse Development Cooperation – Bolivia
Luca	Citarella	Cooperation Section Water and Sanitation	European Commission - Bolivia
To	Toeljker	Chief of Cooperation	Embassy of Netherlands in Bolivia
Eduardo	Zeballos	Team Coordinator	Paris Declaration Evaluation – VIPFE - Bolivia
Milka	Mora Céspedes	Consultant	Paris Declaration Evaluation – VIPFE - Bolivia
Claudia	Cardenas Angulo	Chief of the Financing Programming and NGO's Coordination Unit	Vice Ministry of Public Investment and External Financing – Ministry of Development Planning - Bolivia
Myragliha	Giles Castillo	Chief of the Negotiation and Disbursements Unit	Vice Ministry of Public Investment and External Financing – Ministry of Development Planning - Bolivia

Bolivia Case Study

Waldo	Albarracin	Ombudsman	Ombudsman's Office – Bolivia
Ayako	Mikami	Second Secretary, Cooperation	Embassy of Japan in Bolivia
Jorge Antonio	Pedro Burgoa	Coordinator for Economic Cooperation	Embassy of Japan in Bolivia
Julio	Loayza	Economist	World Bank – Bolivia
Ruth	Llanos	Social Specialist	World Bank – Bolivia
Ericka	Brockman	Diputada	Congress of Bolivia
Jorge	Nuñez	Former Chief of the Coordination Unit for the National Dialogue 2004 – 2005 - Bolivia	Development Investigation Centre for the State University in La Paz (CIDES-UMSA) - Bolivia
Diego	Muñoz	Co-ordinator	Malnumby Ñakurutú – Investigation and Action for Development
Participants in Civil Society Workshop			
Teresa	Flores		Prodena
Rosario	Mamani		Cidem
Mary	Marca		Cidem
Monica	Montaño		Cidem
Susana	Eróstegui		Unitas
Lourdes	Montero		Centro Gregoria Apaza
Juan Luis	Espada		Cedla
Verónica	Flores		Cidem
María Teresa	Soruco		Amuperi
Patricia	Montes		Ildis
Isabel	Arroyo		Ildis

Annex A Terms of reference

**Strengthening the poverty impact of the Paris Declaration:
Aid effectiveness evidence gathering project on gender equality, human rights and social exclusion:**

Terms of reference for Phase Two, July 2007

Background and rationale

1. In March 2005 over one hundred official agency donors and developing countries established global commitments to support more effective aid in the context of significant scaling up of aid. The result, the *Paris Declaration on Aid Effectiveness (PD)*, marks an unprecedented level of consensus and resolve to reform aid. These reforms are intended *'to increase the impact of aid...in reducing poverty and inequality, increasing growth, building capacity and accelerating the achievement of the MDGs'* (Paris Declaration para 2).
2. The PD framework agreed five overarching principles or partnership commitments – ownership, alignment, harmonization, managing for development results and mutual accountability. It goes beyond previous agreements and lays down a practical, action-oriented roadmap to improve the quality of aid and its impact on development. Donor and partner countries agreed a set of indicators, targets, timetables and processes to monitor the implementation of the PD up to 2010. This includes the **Third High Level Forum to take place in Ghana in September 2008**.
3. To date attention by donors and partner governments has primarily focused on aid and agency effectiveness, in particular improvements in aid delivery to increase the efficiency of financial and administrative arrangements; harmonisation of donor procedures and activities, and strengthening partner government leadership and ownership with alignment behind national development plans. The Paris Declaration itself and the indicators for monitoring focus on mechanisms and processes, and does not monitor substantive issues such as the development of content and outcomes. The focus on aid delivery mechanisms is much needed. However, on their own, they will not lead to the envisaged development effectiveness or sustainable benefits for poor women and men unless issues of substance such as gender equality, rights and inclusion are addressed in parallel.
4. However, a more complete reading of the PD locates the commitments more clearly within the ultimate goal of reducing poverty and inequality and requires an assessment of wider outcomes and impacts on poor and excluded women and men. The partnership commitments are major reference points for strengthening broad based ownership, guiding policy dialogue, shaping the contents of development co-operation programmes and bringing about institutional and budgetary changes required to improve poverty outcomes and empower poor and excluded groups. More attention needs to be paid to ends as well as means of channelling aid, and to processes necessary for poverty reduction, particularly those concerned with human rights, social exclusion and gender if the aims of the PD and the MDGs are to be realised. These reforms provide an opportunity to improve current practice of donor agencies, recipient governments and civil society in pursuit of gender, rights and inclusion to the betterment of women, men, girls and boys (Gaynor 2007).
5. In September 2008 the **Third High Level Forum on AE**, in Accra Ghana, will review progress in implementing the PD and set a pathway to 2010 and beyond. This is likely to be a high profile event, attracting far greater scrutiny from the media, civil society and partner governments than in Paris 2005. It is an opportunity to reaffirm, accelerate and deepen the Paris Agenda and to

mark its transformation into a country-led framework for aid relationships and aid effectiveness. It also is an opportunity to strengthen the focus on poverty outcomes in the implementation of the PD, including through greater integration of cross cutting issues.

6. To ensure the HLF recognises the relevance of cross cutting issues in operationalising the Aid Effectiveness agenda, more systematic evidence is required on how, and to what extent, cross-cutting issues of gender equality, human rights and social exclusion are analysed, captured and monitored in the evolving new approaches to aid delivery and partnerships. In discussion with the Gendernet, Govnet, the Working Party on Aid Effectiveness (WP-EFF) and Nordic + colleagues, DFID proposed an evidence gathering exercise on aid effectiveness and gender, rights and exclusion to fill this identified gap.

7. In the spirit of the Paris principles, this work is jointly funded by a number of Nordic + partners including the Irish, DFID and the possibly the Dutch. It builds on the momentum created by the Dublin Workshop in April 2007 which brought together the WP-EFF, Gendernet, Govnet and Environet.²³ It seeks to complement on ongoing cross-cutting work to strengthen the evidence base such as the Unifem project on Building Capacity and Improving Accountability for Gender Equality in Development, Peace and Security, and also Irish Aid's desk study on Gender and Joint Assistance Strategies. It should also complement other efforts in monitoring progress such as the Baseline Survey and the DAC joint evaluation on Aid Effectiveness. Overall this work should contribute to the development of shared messages and agreed outcomes for the HLF3 for a strengthened focus on social outcomes especially gender outcomes beyond Ghana.

8. A scoping study (phase 1) funded by DFID was undertaken as a first step towards developing this evidence base. This produced a synthesis of relevant literature on aid effectiveness and cross cutting approaches; a synthesis of civil society perspectives; an initial analytical framework and approach for evidence gathering; and a partnership and influencing strategy which maps key opportunities, partners and processes leading up to Ghana 2008. Building partnerships and influencing is an important component of the work.

9. The initial **analytical framework** is described in the main body of the Phase 1 report²⁴. It builds on the synergies between the cross-cutting issues of gender equality, human rights and social exclusion, and that of the PD. It maps change processes in both onto key areas of the policy cycle and enables a matching of opportunities and risks as well as good practice in both the aid effectiveness and cross-cutting agendas.

10. The **partnership and influencing strategy** is set out in the main body of the Phase 1 report²⁵. It is integral to the selection and implementation of the case studies and the dissemination of findings. The aim is for the project to be carried out in such a way as to maximise opportunities for joint work among a range of partners, and to influence key stakeholders in the lead-up to the Ghana HLF and beyond.

²³ The Dublin workshop looked at environmental issues. We recognise that HIV/Aids is seen as a cross cutting issue. This work will however, focus on gender, rights and exclusion only.

²⁴ Aid effectiveness and cross cutting issues – gender equality, human rights and social exclusion: Strengthening the poverty impact of the Paris Declaration. By S. Fleming, M. Cox, Kasturi Sen, Katie Wright-Revollo. 31 March 2007.

²⁵ Ibid

Goal

11. Cross-cutting issues of gender equality, rights and exclusion firmly on the Ghana HLF agenda and analysed and captured in the implementation and review of the Paris Declaration on Aid Effectiveness, in order to strengthen the focus and impact on poor women and men.

Purpose

12. To generate an evidence base, build support among Paris Declaration stakeholders and provide practical recommendations for strengthening the focus on the cross-cutting issues of human rights, social exclusion and gender equality, and poverty outcomes, for the Third High Level Forum in Ghana (2008) and beyond.

13. Specifically the research should be able to answer how effectively the policy areas of gender, rights and social exclusion are addressed in:-

- Budget support processes, structures and mechanisms; Sector Wide Approaches
- New aid effectiveness mechanisms for operationalising the Paris Declaration at country level e.g. Performance Assessment frameworks, Joint Assistance Strategies, Aid Policy frameworks; national planning processes and plans, PRS monitoring frameworks
- The country level dialogue, relationships and decision making related to the new aid environment. Including the relationships and dialogue between donors, partner governments and civil society, and the spaces and processes for dialogue and decision making e.g. harmonisation groups, results and resources groups/ consultative groups, mutual accountability mechanisms.

Outputs and timing

14. The outputs for the project will include:

i) An inception report detailing methodology, locations and partners, with rationale; a work plan with timetable; and a partnership and influencing plan: by end of month 1, to be discussed and agreed and updated as required

ii) A series of approximately 6 in-depth case studies of 10-15 pages each: finalised by December 2007

iii) A document summarising the other, approximately, 18 relevant examples and experience from the literature and other on-going research (36-50 pages): finalised by December 2007

iv) A synthesis report (maximum 50 pages including annexes) which presents the main lessons from the case studies, rapid assessments, and additional contemporary research and literature: finalised by January 2008. The synthesis report will include:

- (a) Evidence on how cross-cutting social issues have been integrated into and benefit current approaches to aid effectiveness; as well as where they have been omitted
- (b) How the PD applies to donor and partner country efforts to promote cross-cutting social issues;
- (c) Recommendations for integrating cross cutting issues into PD implementation, monitoring and evaluation.

Bolivia Case Study

(d) Recommendation for 2 – 3 high level strategic key messages and concrete outcomes for the HLF

v) An influencing strategy with identification of alliances and influencing opportunities supported by a short presentation paper (4-6 pages) to present the results of the study and its principal recommendations to senior policy makers and other stakeholders at the Accra HLF: finalised by March 2008

vi) A series of briefs and/or presentations on emerging findings. These outputs should be tailored to specific events and audiences outlined in the partnership and influencing strategy: on-going and responsive

vii) Series of workshops and presentation materials for final events in the in-depth case study countries and for the project as a whole: on-going and responsive

viii) Quarterly progress reports

Tasks

15. The tasks are outlined below:

i) Finalise a work plan and a partnership and influencing plan, detailing roles of collaborating donors and country government, civil society and research partners. Outline types and timetable of products for DAC, donor, country government and civil society audiences, including proposals for feedback at country level, and final presentation and discussion. Some flexibility will be needed to respond to changing priorities and opportunities for building partnerships and exercising influence as they arise. Guidance for the plan is in the method section of these TORs.

ii) Develop a methodology to assess how gender, rights and exclusion in relation to the Paris Declaration are addressed in budget support processes, structures and mechanisms; new aid effectiveness mechanisms for operationalising the Paris Declaration and country level dialogue, relationships and decision making in the new aid environment. A suggested list of study questions and an overall conceptual framework for these studies are included in the phase 1 scoping report²⁶ as a guide

iii) Carry out approximately 6 in-depth country case studies and 18 rapid assessments. Criteria for choice of case studies are in the method section of these TORs.

iii) Monitor and brief joint donor steering group on key processes, events and developments in preparation for Accra, amongst the DAC WP-EFF, the donor community and key civil society actors.

iv) Organise feed back of results in the case study countries, and a series of workshops to present the findings and recommendations to a diverse group of key stakeholders e.g. donors, civil society, WP-EFF, North and South.

Method and principles

16. Study principles and design:

²⁶ Ibid

- The PD principles and commitments and their relationship with the cross-cutting issues of gender, human rights and social exclusion, are the central focus of the study;
- Aid instruments (e.g. Poverty Reduction Budget Support, Sector Wide Approaches), modalities (e.g. gender and participatory budget / monitoring and evaluation initiatives, PRS processes) and management frameworks (e.g. Joint Assistance Strategies, Performance Assessment Frameworks, harmonisation groups, national planning cycles) and systems for dialogue and decision making (donor working groups etc.) should provide concrete examples of the PD commitments and issues;
- The case studies will focus on practical lessons and experience, particularly of emerging good practice, that could act as a guide for policy makers and practitioners (both aid effectiveness generalists as well as cross cutting specialists);
- The study design and implementation should adhere as far as possible to the spirit of the PD principles of i) broad-based country ownership (the issue could be of importance to either sector ministries, regional and local government, parliaments and assemblies, or civil society organisations), ii) alignment with research strategies of in-country actors (through consultation and possible direct participation with southern researchers), iii) harmonisation with other donor efforts on cross-cutting issues, iv) consultation with both government and civil society in country-specific design, open and transparent with study results, ensuring accessibility, enabling feedback to the range of in-country partners;
- The two levels of research are a) in-depth studies, using secondary data, individual and focus group interviews with stakeholders and where appropriate use of the relevant research in the area and b) rapid assessments using secondary data, telephone interviews as needed, as well as findings from other research and studies;
- Involve government and civil society in the preparation of individual case studies, work with southern researchers and/or research institutions, and in-country partners, as far as possible.

17. Suggested criteria for selection of case study countries and rapid assessment examples. These are to be chosen to provide a range of different country contexts :

- regional spread across e.g. Asia, Africa, Middle East and South America
- country capacity/ context (good performer, fragile and non-fragile, post conflict)
- degree of dependency (HIPC/MICS/LICS)
- Mixture of budget support and non-budget support countries
- presence of best practice examples and/or risks and opportunities (across the principles)
- where implementation of the Paris principles is making a clear difference (for the better or otherwise)
- relevant issue, owned by partner country governments (central and local) and/or civil society
- preferably non duplication with Unifem country case studies²⁷ but possible complementarity with some country case studies from the AE evaluation
- Countries where DFID offices are keen to engage and can provide a strong country case study e.g. Cambodia

²⁷ Unifem country case studies include Ghana, Ethiopia, Honduras, Cameroon, Ukraine, Kyrgyzstan, Papua New Guinea – possibly Nepal and DRC; AE evaluation include Bangladesh, Bolivia, Mali, Philippines, Senegal, South Africa, Sri Lanka, Uganda, Vietnam, and Zambia.

18. Partnership and influencing strategy

- The project will be carried out in such a way so as to maximise opportunities for joint work among a range of partners, and to influence key stakeholders in the lead-up to the Accra HLF.
- Briefing and dissemination may need to tailor different messages to different audiences, described in the partnership and influencing strategy.
- Briefing and dissemination of evidence will be carried out throughout the life of the project, in order to build awareness of and receptivity to project evidence and recommendations.
- The project will use a range of events and processes as opportunities for disseminating its findings, including international fora and Northern and Southern civil society networks, in the lead up to Ghana.

Reporting

19. The project will be led by the CLEAR and Equity and Rights teams in DFID with reporting to Katja Jobes (CLEAR team) and Clare Castillejo (Equity and Rights Team), who will chair a joint donor management group with Irish aid. The exact composition and roles will be determined at the time of awarding contracts. The consultants will submit quarterly progress reports.

Competencies

20. The team will have skills and experience in the following areas:

- Multidisciplinary team covering the technical areas of mainstreaming cross cutting approaches – gender, human rights, social exclusion *and* aid effectiveness; current knowledge and experience of both areas
- Policy aptitude and experience in multi-donor fora, and with policy engagement on cross cutting issues and aid effectiveness
- Understanding and experience of the Paris Agenda, the process and the OECD/DAC machinery for effective influencing
- Research/communication skills and experience, experience of managing different research sites, working in partnership with a range of government, civil society and southern research partners
- Qualitative and participatory research skills
- Wide geographic experience, with country coverage in the team across Asia, Africa, Middle East and Latin America

Department for International Development

Annex B Summary information on poverty in Bolivia

Bolivia has population of nearly nine million inhabitants. Sixty percent of the population lives in urban areas. Approximately 67% of the population in Bolivia is below the poverty line and 38.2% were estimated in 2005 to be in extreme poverty. In rural areas poverty is nearer 84%, however extreme poverty is concentrated at present in the belts around the cities, where people from rural areas have migrated in search of better conditions.

The National Development Plan (PND) (2006) seeks to bring about a considerable increase in household incomes. This, linked to greater participation by the vulnerable population, is also intended to reduce income inequality. It is hoped to reduce the proportion of the population below the poverty line to 22% by 2015 and thus one of the Millennium Development Goals can be fulfilled.

According to the population and housing census taken in 2001, 50% of the Bolivian population was indigenous and 60% of the indigenous population lived in rural areas. This figure has changed in the last few years. Today, the indigenous population is concentrated in urban areas (poverty belts) and peri-urban areas at approximately 58%.

The census also shows that 51% of the Bolivian population are women, 8.37% of whom are illiterate. Women account for 41% of the economically active population and average 5.6 years of schooling.

Bolivia is one of the most unequal countries in the world and has struggled to address the persistent problems of poverty and inequality. The 2005 UN Human Development Report²⁸ ranked Bolivia 113th out of 177 countries, with a GNI per capita of USD 1,027 and with 34% earning less than USD 2 per day. 63% of the population were considered poor. Maternal and infant mortality are among the highest in the Andean region and high levels of malaria and tuberculosis exist. Waterborne disease is a major cause of morbidity and mortality, with 15% of deaths in children less than 5 years old due to diarrhoea (See Table B.1). A report prepared for UNIFEM found a persistent poverty gap between indigenous and non-indigenous populations in Bolivia, with greater inter-ethnic than intra-ethnic inequities between men and women.²⁹ Non-indigenous men earn double the income of an indigenous man, while a non-indigenous woman fares even better compared to an indigenous woman.³⁰ Table B.1 also shows a striking difference between regions regarding access to safe water and sanitation, which also reflects urban/rural differences. According to the 2001 census, 88% of the urban population had access to safe water and 48% access to sanitation, while the corresponding rural figures are 46% and 32% respectively. Even for those that do have access to water, the quality, quantity and stability of access is commonly inadequate.

There are signs of overall improvement in recent years, though the improving performance still shows up persistent inequalities and the consequent challenges for government. World Bank data for 2004³¹ shows that Bolivia is on track to achieve many of the MDGs, which is underpinned by increased social expenditures. Access to water supplies has been improving since the 2001 Census. According to the World Bank, 85% of the population is served by an improved water

²⁸ UNDP 2005 Human Development Report quoted in AECI 2006 Programa Regional Andino

²⁹ Jiménez Zamora 2006)

³⁰ Mecovi 2002 in Wilson, Jiménez et al 2006.

³¹ <http://devdata.worldbank.org/idg/IDGProfile.asp?CCODE=BOL&CNAME=Bolivia> accessed 5/12/2007

source. The net primary enrolment rate for primary children was 94% in 2004, and enrolment of girls is even better. The under 5 mortality rate in 2005 was 65 per thousand, already about half of the 1990 rate and on track to achieve a reduction of two thirds by 2015. However, mortality under 5 years fell in 27% of households with most resources and only in 5% of the poorest households. According to the World Bank, some of these improvements occurred because government social expenditures were increasing in the period up to 2005.³² However, only 46% of the population had improved sanitation in 2004 and the government is struggling to address the needs.

Table B.1 Under 5 mortality and access to water and sanitation

	Under 5 mortality from diarrhoea % (2000)	% without access to adequate sanitation	% without access to piped water supply
BOLIVIA	15	37	38
Beni	10	18	65
Chuquisaca	4	53	46
Cochabamba	12	33	46
La Paz	5	43	35
Oruro	42	62	43
Pando	29	28	61
Potosí	24	66	56
Santa Cruz	23	13	22
Tarija	12	26	25

Source: INE UDAPE 2001

There are indications that these improvements have not been shared equally between regions of Bolivia and the current government (since 2006) plans to take even more vigorous action to address the inequalities in Bolivia. The data (Table B.2) collected by UNDP³³ for different departments of Bolivia show marked differences between regions, as shown in the table below which contrasts the situation in the Andean area of Potosi with the lowland area of Santa Cruz. To a large extent, the differences reflect contrasts between indigenous and non-indigenous populations, urban and rural residence, and poor and rich areas.

³² World Bank 2005 Bolivia: Country Assistance Evaluation.

³³ The data collected by UNDP refers to years later than 2004 so it differs from the World Bank data in certain respects though the trends are in the same direction.

Table B.2 Progress with MDGs, including regional variations

MDG	Bolivia	Potosi	Santa Cruz
Extreme Poverty %	40.4	66.7	25.1
Chronic malnutrition %	24.2	38.8	12.3
Net Primary Enrolment %	94.0	87.4	96.2
At 8 th grade %	77.8	64.0	81.1
Gender balance 8 th grade boys:girls %	0.3	8.9	- 3.9
Infant mortality /1,000	54	72	39
Vaccinations %	84.5	92.6	80.0
Maternal mortality /100,000	233.8	375.7	171.8
Attended childbirths	61.9%	51.5	67.1
AIDS /million	17.1	0.0	32.7
Chagas %	36.9	40.0	31.9
Malaria /1,000	5.5	4.6	0.32
TB %	78.1	78.0	84.9
Improved water %	71.7	62.7	83.2
Improved sanitation %	43.5	32.7	33.6

Source: UNDP Bolivia, Archivos\ODMS.htm

Recent data also show that gender imbalances have been improving though there are similar regional variations. While there are more illiterate women (4%) than men (1%) in the 15-24 years age group, 96% of girls are now enrolled in primary school, more than for boys (95%). Of these girls, 98% will complete their primary education and slightly more girls than boys will complete fourth grade of secondary school (0.4% in favour of girls). However, in some indigenous upland areas (such as Potosi) more boys will complete primary school and in just one department (La Paz) more boys will reach the fourth grade of secondary school.

Annex C Multi-Donor Budget Support Program (PMAP) 2005 Policy Matrix

i) Administration of Public Finances

Objective	Goal	Verification in 2005	Subsequent Years
Improve the administration and transparency of public management	1. Introduce results-oriented management in the National Budget (PGN)	a) Results-oriented management in the internal revenue service (SIN) and the customs service (ANB) b) Automatic reporting of budget expenditures, progressively incorporating a functional classification of expenditures	Results-oriented budget and functional classification of budget within SIGMA as of 2006.
	2. Conclude the functional classification of the 2006 Budget for the development of pro-poor expenditure indicators.	c) Proposed 2006 Budget which includes functional classification. d) Pro-poor expenditures indicators agreed upon by the first quarter.	
	3. Complete the integral registry of personnel in the Non-Financial Public Sector (SPNF)	e) Integrated registry system of personnel in pilot institutions within the Central Administration.	Public servants registered in the Central Administration and salary policy enacted.
	4. Advance on the definition of a national salary policy in the Central Administration	f) Definition of the institutional structure charged with salary policy and the presentation of a proposed salary policy	
	5. Consolidate and increase the utilization of SIGMA (on-line payments system)	g) The Master Plan will be implemented, transferring central and decentralized SIGMA to the General Direction of Accounting. h) Computer systems strengthening including a Security Plan (security / backup) in the central administration. i) Implantation of SIGMA in the municipalities of Oruro, Potosí and Tarija. j) Pilot tests to modify SIGMA, or another system,	SIGMA functioning in all departmental governments (prefecturas). Computer systems security plan functioning for all SIGMA users. Small and medium-size municipalities using SINCOM, or

Bolivia Case Study

Objective	Goal	Verification in 2005	Subsequent Years
	<p>6. Fiscal Responsibility Law</p> <p>7. Strengthen institutional reform in the Ministry of Finance, the Comptroller's Office (CGR), the National Statistical Institute (INE), and the National Service of Public Assets (SENAPE)</p> <p>8. Advance in the fight against corruption</p> <p>9. Implementation of the Transparent Transition Program</p>	<p>for medium and small municipalities.</p> <p>k) Small municipalities will be advised on the use of SINCOM, incorporating improvements to the system and adjusting them gradually to SIGMA.</p> <p>l) Proposed Law presented to Congress</p> <p>m) ARI (Institutional Reform Agreement) signed with the Ministry of Finance and the General Comptroller's Office (CGR)</p> <p>n) At least 40% of staff institutionalized in the Ministry of Finance.</p> <p>o) Publication of positions to fill (merit-based), for the selection of staff in INE (National Statistical Institute) and SENAPE (National Service of Public Assets)</p> <p>p) Completion of at least 40% of the Annual Operating Plan (POA) of the Integral Anticorruption Plan for the year 2005.</p> <p>q) Complete administrative-financial information provided to at least 50% of the new authorities in municipal governments.</p> <p>r) Completion of at least 30% of the Three-Year Plan of the Ministry of Popular Participation</p>	<p>another system compatible with SIGMA.</p> <p>Monitoring of the approval/application of the Law.</p> <p>Institutional reform of INE and SENAPE in process.</p> <p>Three Year Plan completed.</p>

Bolivia Case Study

ii) Fiscal Policy

Objective	Goal	Verification	Subsequent Years
Improve the distribution and quality of equitable public expenditures	<ol style="list-style-type: none"> 1. Budget reallocation for greater efficiency and equity 2. Reduce the costs of the pensions system 3. Deepen the tax reform to advance towards an equitable tax system 	<ol style="list-style-type: none"> s) Determine parameters and indicators for a more efficient budget reallocation to universities. t) Progressive implementation of the Supreme Decrees which incorporate recommendations of the Pensions Commission. u) Present a strategy to advance with an equitable tax system. 	<p>Construction of indicators for budget reallocations in health and education.</p> <p>Implementation of the tax reform.</p>

iii) Advances in a National Poverty Reduction Policy

Objective	Goal	Verification	Subsequent Years
Ensure an efficient application of the National Development Strategy	<ol style="list-style-type: none"> 1. Application of the new National Development Strategy which includes a strategy for poverty reduction 2. Information system for monitoring of the National Development Strategy, including a strategy for poverty reduction 	<ol style="list-style-type: none"> v) Action plan for the fight against poverty, taking into account the results of the National Dialogue. w) Information system functioning progressively in 2005. 	<p>Implementation of the strategy, with specific completion goals.</p> <p>Complete functioning of the information / monitoring system of the strategy.</p>