The **CEQ Institute**: a brief description

**Mission:** The CEQ Institute works to reduce inequality and poverty through comprehensive and rigorous tax and benefit incidence analysis, and active engagement with the policy community.

**Objective:** To measure the impact of fiscal policy on inequality and poverty across the world using a comparable framework.

**Workstreams:**

- Research-based policy tools ([CEQ Handbook](#)) and [country studies](#)
- [Data Center](#)
- Advisory and [training](#) services
- [Bridges to policy](#)
Why the **CEQ Institute**?

- An unequal world where 800 million live on less than US$2 per day

- A world full of risks: illness, unemployment, droughts, epidemics, conflict

- Through safety nets, pensions, education, health and infrastructure, governments can make a difference
Why the **CEQ Institute**?

- We ask how much of a difference are governments making through taxes and social spending?

- Can governments do more/do better?

- How do we do it? With a method called **tax and benefit incidence analysis**
Meet the **team**

- **Nora Lustig**
  Director
  New Orleans

- **Ludovico Feoli**
  Director
  Policy Area
  New Orleans

- **Jon Jellema**
  Expert for
  Africa, Asia and Europe
  Frankfurt

- **Stephen Younger**
  Expert for
  Africa, Asia and Europe
  Ithaca

- **Maynor Cabrera**
  Expert
  for Latin America & the Caribbean
  Guatemala City

- Sean Higgins (Berkeley) and Sandra Martinez-Aguilar (London)
  Experts for Latin America & the Caribbean and Software Development

- **Carlos Martin del Campo**
  Communications and Outreach
  Washington, D.C.

- **Samantha Greenspun**
  Director of Grants and Project Management
  New Orleans

- **Maya Goldman**
  Junior Expert for
  Africa and Asia
  Capetown

- **Itzel Martinez**
  Expert on Administration
  Mexico City
Meet resident **Research Associates**

James Alm  
Professor and  
Chair of  
Economics

Stefano Barbieri  
Associate Professor  
of Economics

PhD students, Economics (from left to right): Rodrigo Aranda (Mexico), Sanjukta Basu (India), Koray Caglayan (Turkey), Ali Enami, (Iran), Siyu Quan (China)

Mashfiqur Khan (Bangladesh)  
Postdoctoral  
Fellow  
Murphy Institute
A brief history

• 2008 – CEQ was born at the Inter-American Dialogue in Washington DC
  • Pilot countries: Argentina, Mexico, and Peru

• 2009 – At Tulane, its scope grew with CIPR support
  • Joint initiative with the Center for Global Development and the Inter-American Dialogue

• Bolivia, Brazil, Chile, Colombia, Costa Rica, El Salvador, Guatemala, Paraguay, Uruguay, and Venezuela
A brief history

• 2013 – Beyond Latin America…
  - Award from Bill & Melinda Gates Foundation Ghana and Tanzania

- Joint project with World Bank (2013)
  - Armenia
  - Ethiopia
  - Georgia
  - Indonesia
  - Jordan
  - Russia
  - South Africa
  - Sri Lanka
A brief history

• 2015 – New directions:
  • **CEQ Institute** is founded at Tulane in May
  • The **Bill & Melinda Gates Foundation** awards Tulane a grant for $4.9 million over 5 years to support CEQ’s work
A brief history

• 2018 – **MOU with World Bank**
  
  • Data-sharing
  • Advising and training
  • Knowledge products and tools

• The data-sharing component will **increase the country coverage by 50 percent in the next two years**
A brief history

• 2018 – CEQ receives National Science Foundation grant to support the Data Center on Fiscal Policy, Poverty, and Inequality.

• The project will develop a state of the art visualization tool as well as software modules to make the CEQ Institute data easily accessible and useful to researchers, policy makers, and the public.
Celebratory reception | MoU with World Bank, Tulane University, April 26, 2018

From left to right: Tulane University’s President Michael Fitts, Thomas Reese, Laura Levy, Nora Lustig, James Alm, Robin Forman and Ludovico Feoli. Maria Davalos from the World Bank and Vishal Gujadhur from the Gates Foundation. Portrait of Samuel Z. Stone in the background.
CEQ in numbers: **country coverage**

- 41 finished
- 25 in progress

➢ Nearly 80% of world’s extreme poor
CEQ in numbers: collaborators and partners

• Over 60 consultants from 40 countries around the world

• Over 50 Research Associates

• 25 partners including:
  • World Bank
  • IMF
  • Inter-American Development Bank
  • OECD
  • AfDB
  • ADB
  • Global Development Network
  • Oxfam
  • Universities, institutes and nonprofits
Collaborators and partners

• Ludovico Feoli shaking hands with OAS Secretary General Luis Almagro after signing of MOU in January 2016
CEQ in numbers: publications

• 18 peer-reviewed journal articles

• More than 70 CEQ Working Papers

• CEQ Snapshot
CEQ Publications in peer-reviewed journals

JDE 2016
RDE 2017
ADR 2017
ETE 2017
LARR 2017

ROIW 2018 (forthcoming)
Example of CEQ analysis
How taxes and benefits reduce inequality:
a comparison of Brazil and the US

Source: Higgins, Lustig, Ruble and Smeeding, 2016
CEQ in numbers: publications

Book

CEQ in numbers: publications

**CEQ Handbook** Forthcoming, Brookings Institution Press

Unique step-by-step guide for determining the impact of taxation and public spending on inequality and poverty

Contains methods, applications, and a software package for conducting the CEQ Assessments, along with examples of these assessments from several countries

Open source: digital version will be FREE
CEQ and methodological innovations

• Redefining how to measure the equalizing effect of a tax or a transfer

• By graduating PhD student Ali Enami, Nora Lustig and PhD student Rodrigo Aranda | Chapters in CEQ Handbook
CEQ and methodological innovations

• An indicator of Fiscal Impoverishment
  • By former PhD student Sean Higgins and Nora Lustig | Published in the Journal of Economic Development

• Indicators of spending and impact effectiveness
  • By Ali Enami | Chapters in CEQ Handbook

➢ ALL used by IMF and the World Bank in policy advice
Bridges to policy

Gabriela Inchauste,
Lead Economist, World Bank

“The CEQ-based policy simulations have been especially useful in Armenia, Georgia and Indonesia which have since undertaken reform efforts…”

Read more in CEQ Snapshot 2
Bridges to policy

Prof. Tassew Woldehanna
Addis Ababa University
Member of the CEQ-World Bank Ethiopia team

“The results from the Ethiopia CEQ Assessment contributed to two key policy changes in 2016: the cash transfer program was expanded to include urban areas and the minimum threshold of taxable personal income was raised.”

Read more in CEQ Snapshot 2
“The CEQ methodology will allow us to operationalize the inequality talk.”
Bridges to policy

- CEQ Associate Director Stephen Younger and Nora Lustig with Seth Terkper, then Minister of Finance in Ghana, October 2015
Bridges to policy

- Lea Gimenez, Minister of Finance of Paraguay, thanking the CEQ Institute and World Bank for the CEQ tool, September 2017
Dissemination: the CEQ around the world

Stephen Younger in CEQ workshop in Tanzania
January 2016

CEQ at G24, March 2016
1. Analyzing the impact on mortgage rates in high-income countries
2. Assessing the impact on mortgage rates in low-income countries
3. Analyzing the impact on mortgage rates in medium-income countries

CEQ at LACEA, Bs. As., Nov 2017

CEQ workshop in LASA

CEQ at UNAM, Mexico, 2014

CEQ at OECD, Paris, October 2016

CEQ at Oxfam, Washington, DC, April 2017

CEQ Workshop at Universidad de San Andres, Buenos Aires, November 7 and 8, 2017

CEQ workshop in South Africa, November 2014

Commitment to Equity Assessments

- Promoting transparency, accountability, and non-discrimination
- Enhancing participation and engagement
- Examining the impact of policies and programs on equity
- Developing and implementing policies that promote equity
- Addressing and reducing disparities
- Ensuring that policies are inclusive and accessible to all sections of society

- By Stephen Younger, November 2014

- By Stephen Younger, March 2016

- By Stephen Younger, November 2017

- By Stephen Younger, October 2016

- By Stephen Younger, April 2017

- By Stephen Younger, November 2017

- By Stephen Younger, December 2014
Training in CEQ methods


Sean Higgins, CEQ Co-Director of Data Center at *Evento de aprendizaje sobre la metodología. CEQ & World Bank, Asuncion, Paraguay, September 22-24, 2015.*

Maynor Cabrera, CEQ Associate Director for Latin America & the Caribbean at *Evento de aprendizaje sobre la metodología. CEQ & World Bank, Santo Domingo, Dominican Republic, June 15-16, 2016.*
CEQ and student mentoring

- 2 concluded PhD dissertations, 1 Master’s thesis and 1 Honor’s thesis
- 3 PhD dissertations in progress
- CEQ data used in classes for hands-on policy simulations
- Research Assistantships
- Publications in peer-reviewed journals and books
CEQ and student mentoring

- Doctoral and postdoctoral fellowships
- Consulting opportunities at multilateral organizations
- External funding opportunities
- Networking
- Participation in international conferences
CEQ and student mentoring

CEQ Director Nora Lustig (center), PhD students Ali Enami and Sean Higgins, and CEQ staff Jon Jellema (right) and Sandra Martinez at a CEQ training event for World Bank staff in CEQ methods, February 2016

Schloss Prize recipient and graduating PhD student Ali Enami in dissertation defense, April 2018

CEQ Working Papers co-authored by PhD students (a sampler)
What is next?

- Launch of CEQ Data Center, unique repository of harmonized microdata and summary indicators on fiscal redistribution around the world
- CEQ Handbook 2020
  - Measuring the quality of education and health spending
  - How sustainable redistributive policies are
  - Ensuring the rich pay their fair share
  - Gender-sensitive fiscal incidence analysis
- Mainstreaming in policy analysis
- CEQ methodology certification course