



CEQ INSTITUTE
COMMITMENT TO EQUITY

Tulane University

www.ceqinstitute.org

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



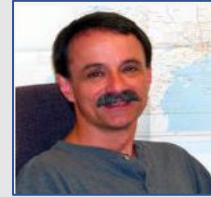
[Nora Lustig](#)
Director
New Orleans



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



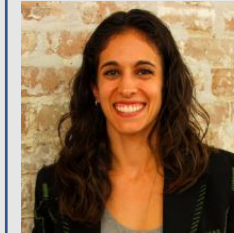
Maynor Cabrera
Expert
for Latin America &
the Caribbean
Guatemala City



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

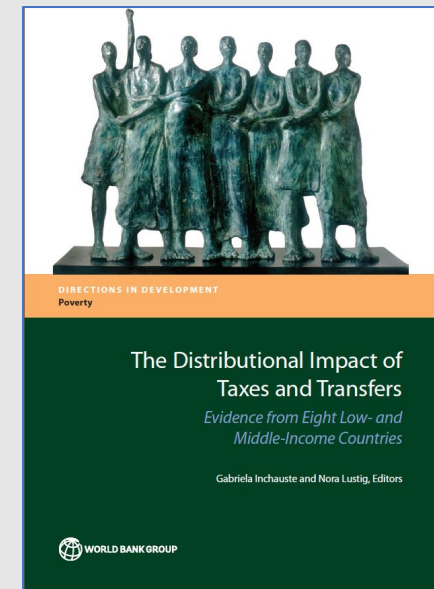
- 2013 – Beyond Latin America...

- 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

2017



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

**CEQ INSTITUTE**
COMMITMENT TO EQUITY
Tulane University


The Commitment to Equity Institute and the Center for Inter-American Policy and Research invite you to:

A Celebratory Reception

To mark the signing of a Memorandum of Understanding with the World Bank which will significantly increase the country coverage and policy reach of the Institute's work

Thursday, April 26 at 4pm
Richardson Building, Suite 205

Please RSVP to CIPR@tulane.edu

**CIPR**
Center for Inter-American Policy & Research



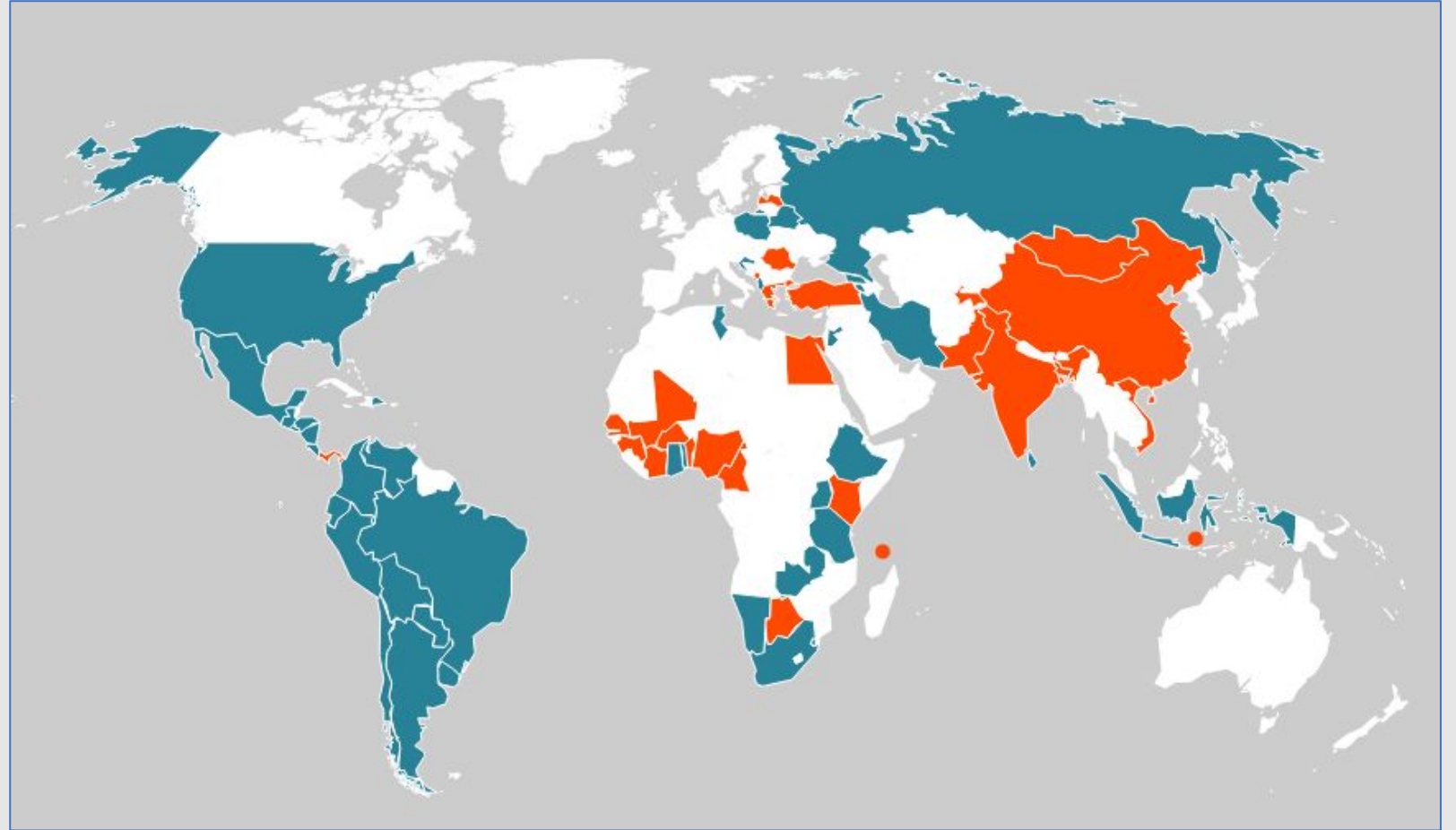
From left to right: Tulane University's President Michael Fitts, Thomas Reese, Laura Levy, Nora Lustig, James Alm, Robin Forman and Ludovico Feoli. Maria Davalos from the World Bank and Vishal Gujadhur from the Gates Foundation. Portrait of Samuel Z. Stone in the background.



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](#)

PFR 2014
Special Issue



WD 2014



WD 2015



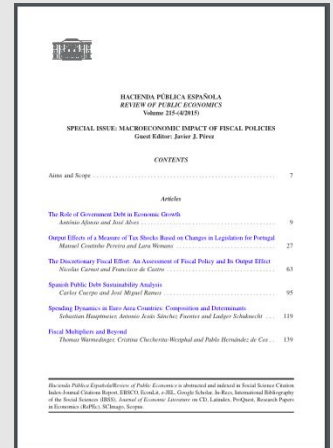
ROIW 2016



JGD 2016



RHPE 2016



CEQ Publications in peer-reviewed journals

JDE 2016



RDE 2017



ADR 2017



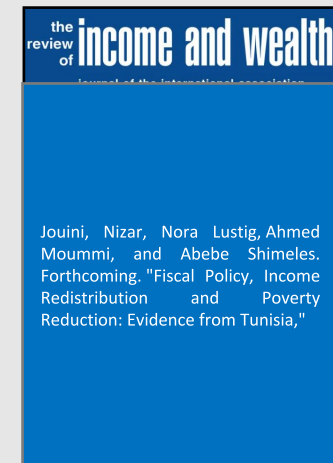
ETE 2017



LARR 2017



ROIW 2018
(forthcoming)

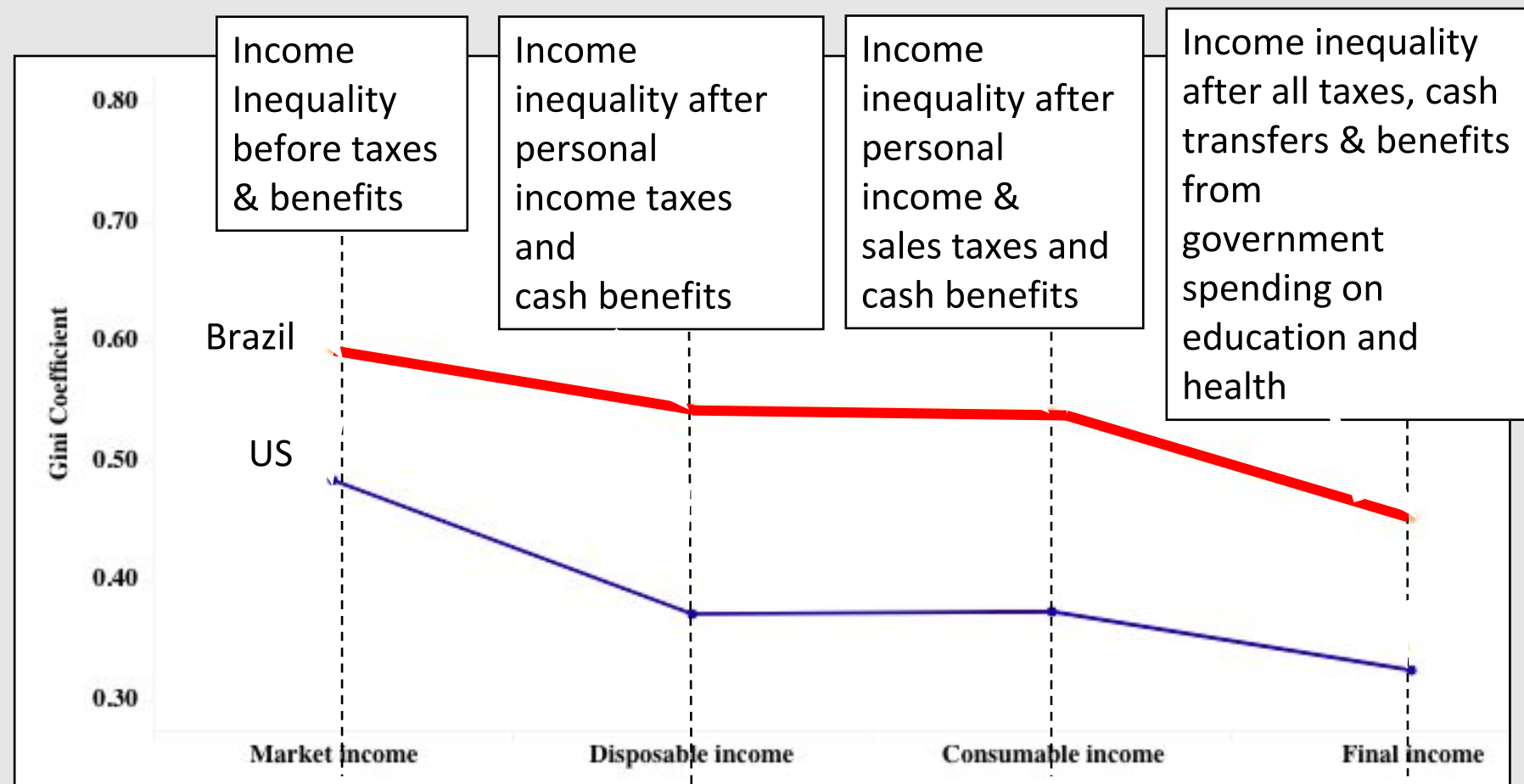




Example of CEQ analysis

How taxes and benefits reduce inequality: a comparison of Brazil and the US

Source: [Higgins, Lustig, Ruble and Smeeding, 2016](#)



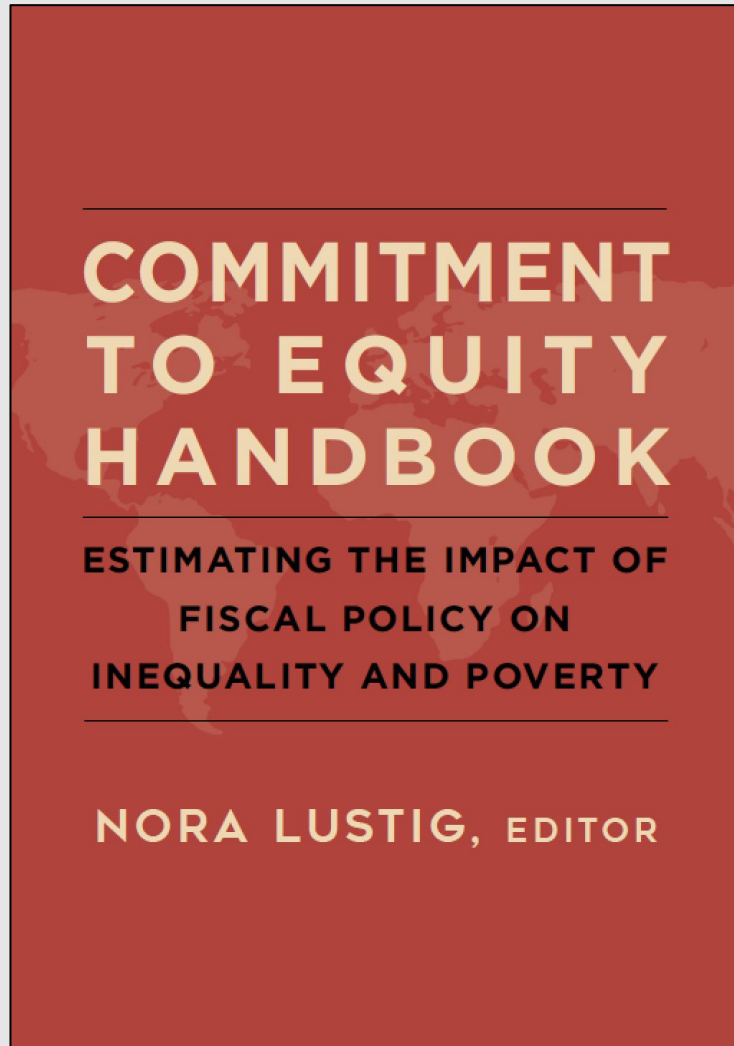
CEQ in numbers: publications

Book

- Gabriela Inchauste and Nora Lustig, eds. 2017. [The Distributional Impact of Taxes and Transfers. Evidence from Eight Low- and Middle-Income Countries](#), Washington DC: World Bank



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...”

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.”

Bridges to policy



Christine Dieterich
Deputy Division Chief
Africa Department
IMF

“The CEQ methodology will allow us to operationalize the inequality talk.”

Bridges to policy



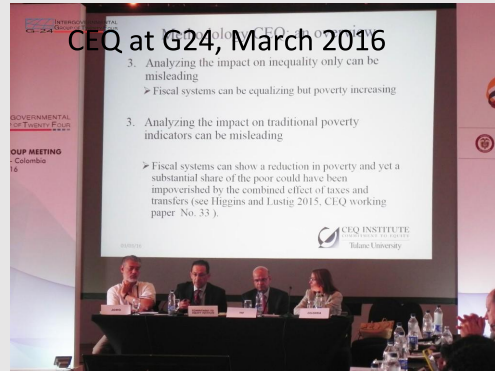
- CEQ Associate Director Stephen Younger and Nora Lustig with Seth Terkper, then Minister of Finance in Ghana, October 2015

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



Training in CEQ methods



Nora Lustig, CEQ Institute Director at Learning Event on the CEQ Methodology. CEQ & World Bank, Washington, DC, [February 18-20, 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](#).



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

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



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