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Vertically Integrated Policy Monitoring: A Tool for Civil Society Policy Advocacy

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Effective independent civil society monitoring of public policy processes requires "vertical integration" to monitor different elite actors simultaneously. Vertical integration refers here to the coordination of policy monitoring and public interest advocacy efforts across different "levels" of the policy process, from the local to the national and transnational arenas. Systematic, coordinated monitoring of the performance of all levels of public decision making can reveal more clearly where the main problems are, permitting more precisely targeted civil society advocacy strategies. Because policy makers' information about actual institutional performance is very limited, rarely field based, and drawn mainly from interested parties (especially in the case of large-scale, decentralized social programs), the resulting information gap creates opportunities for advocacy groups to use independent monitoring to gain credibility and leverage. This article, written originally for a Mexican activist audience, explores the implications of this approach in the context of civil society efforts to monitor and influence World Bank projects.

In this essay, I make two interlocking propositions about advocacy strategies. One involves the "vertical integration" of civil society strategies to influence public policy. The other explores how independent monitoring and evaluation of public policies add leverage and precision to civil society advocacy efforts.

The origins of the word *advocacy* are narrowly legal, referring to lawyers' defense of their clients.¹ In the United States, however, the civil rights movements of the 1960s and 1970s broadened the use of the term in three directions, all still linked with the concept of justice. First, the term *advocacy* refers not only to the legal defense of individuals but also to the defense of interests of

Note: This is a revised, updated, and translated version of a presentation made in Spanish to the Mexican MacArthur Foundation Leadership Fellows at the Hacienda Jurica, Querétaro, November 14 to 16, 1997. For the original Spanish version, visit <http://www.trasparencia.org.mx>. The John D. and Catherine T. MacArthur Foundation's program Global Security and Sustainability supported Mexican civil society initiatives during the late 1990s, including the overlapping areas of women's rights, reproductive health education, environmental alternatives, and indigenous rights. The Leadership Fellow program, coordinated by Ana Luisa Liguori, provided fellowships to outstanding civil society leaders.

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entire groups of excluded or disenfranchised people. Second, *advocacy* also refers to proactive public interest change strategies, that is, efforts that take the initiative to change the rules of the game (in contrast to simply defending causes within the fixed rules of the game). Third, the term *advocacy* encompasses efforts to defend against a wide range of abuses of public power or social exclusion beyond strictly legal problems.

In terms of their targets, advocacy campaigns are often directed toward the executive, legislative, or judicial branches of government. In terms of their approaches, advocacy strategies often combine public education, social mobilization, and direct lobbying. Sometimes these campaigns are linked with political parties, sometimes not. In the United States, advocacy campaigns are often rather nonideological because of the national political culture and the short-term coalition-building tactics required to win congressional votes.

Advocacy strategies and styles vary widely. For example, some approaches try to change laws or budgets, whereas others focus on their implementation. Within most issues of public concern in the United States, there are some public interest advocacy approaches that are more bottom up, emphasizing public education and mobilization; others that focus on influencing the mass media to change the terms of the debate; and still others that try to influence a much more limited group of "decision makers" through sophisticated studies and targeted lobbying campaigns. One key strategy has involved campaigning for benchmark standards for the social and environmental performance of powerful public institutions, which then serve as indicators of accountability. In practice, these strategies often turn out to be complementary and mutually reinforcing.

Historically, this experience and political culture of public interest advocacy in the United States have greatly influenced the transnational civil society coalitions to change the World Bank, although local and national campaigns in developing countries and Europe have adapted these approaches to their own conditions.

VERTICAL INTEGRATION OF CIVIL SOCIETY ADVOCACY STRATEGIES

In this context, my first general proposition stresses the importance of the vertical integration of strategies to influence public policy. *Vertical integration* refers here to the systematic coordination of policy monitoring and advocacy between diverse levels of civil society, from local to state, national, and international arenas. One can find these vertical linkages either in specific sectoral issue areas such as reproductive rights or the defense of biodiversity or in broader, multisectoral campaigns that cut across issue areas, as in the case of the campaigns to increase the public accountability of the World Bank as an institution.²

The vertical integration of advocacy has two major advantages. First, it helps address the problem one could call "squeezing the balloon" (when policy makers try to shift the responsibility for socially costly decisions to others). Second, it helps civil society actors respond to the challenges posed by ever-increasing decentralization of social policy. Take, for example, the process of macroeconomic structural adjustment, which poses multiple dilemmas for social actors, policy makers, and intellectuals who want to promote more socially and environmentally responsible public policies. In Mexico, during much of the 20th century, the executive branch of the federal government was the fundamental actor determining public policy and therefore was the number-one target of influence in favor of any particular cause. Recently, however, between globalization from above and partial democratization and decentralization from below, Mexico's national government has lost its near monopoly on public policy. This has important implications for public interest advocacy strategy.

In Mexico, the process of design and implementation of public policy is increasingly shared between different levels of decision making. This point refers not to the national Congress, whose autonomous power is still incipient. This power sharing refers more to how the federal government has had to cede power both above and below. It is clear that the national government has increasingly lost ground to various international powers (the U.S. government, Wall Street, the International Monetary Fund, and the multilateral development banks). At the same time, the national government has had to share more and more power and money with state and municipal governments, both those that have democratized and those that have yet to democratize, such as the bloc of hard-line, authoritarian governors in the southern states.³

Certainly, this loss of power is relative, and the federal government continues to be the central interlocutor for national public policies. Moreover, when Mexican federal policy makers are dealing with civic and social organizations that are trying to influence public policies, it is very convenient for them to emphasize or even exaggerate the increased weight of either the international or subnational policy-making arenas. That is, it is easy for policy makers to respond to critics by pointing elsewhere and saying, "It's not our department, it's their fault." For example, many kinds of public policies that privilege private business interests can be justified as responses to international business pressures, even though that may not necessarily be true. This seems to have been the case of the 1991-1992 reform of Article 27 of the Mexican constitution (which deals with agrarian reform), for which most of the evidence suggests that it was President Salinas's initiative. The reform may have been intended to attract foreign investment, but it was not a concession to direct, all-powerful pressures to open up the agrarian reform *campesino* sector to market forces (after all, most of these lands are less than attractive to most foreign investors). Another notable case involves the North American Free Trade Agreement (NAFTA) and domestic corn producers. The treaty allowed a buffer period of

15 years before the Mexican market had to open up fully to cheap U.S. corn imports (this was before anyone was worried about genetically modified seeds). Instead, the Mexican government decided to speed up this socially costly process: National trade policy makers opened up the corn market to imports after only 2 years.⁴ Publicly, NAFTA provided a convenient pretext that focused criticism on an apparently untouchable international agreement, allowing the government to evade its responsibility. This is an example of a decision that seemed international but was really national (and very few civil society actors had sufficient access to the relevant policy information to know this). Conversely, looking at lower levels of decision making, the central government can justify all kinds of anomalies committed by undemocratic state and municipal governments in Mexico's "Deep South" in the name of the "New Federalism."

This is where the image of the balloon comes in. In this context of power shared between local, state, and federal governments, as well as international actors, civil society organizations face the problem of the balloon: When you squeeze it here, it pops out there. That is, when an advocacy initiative focuses on a particular branch or level of government, one can pass the ball to another. When one criticizes a state government agency, it is very easy for that agency to pass the buck by blaming the federal government above or the municipal governments below. When a civil society organization questions World Bank officials, they generally duck the criticism and say that whatever the problem is, it is the responsibility of the borrowing government. Similarly, when a national government makes a socially or environmentally costly decision, it may be very convenient if the World Bank appears to have forced the government to do it, so that the direct political cost is reduced. The World Bank may implicitly accept bearing the burden of blame as a political favor to its allies in the borrowing government. So, who has the ball here? This dilemma for civil society organizations is deepened by the lack of transparency at all levels of "public" decision making and policy implementation.

When Mexicans debated the Municipal Solidarity Funds' antipoverty program during President Salinas's term, it was not publicly known that a large part of its budget was covered by huge loans from the World Bank (totaling \$350 and \$500 million, to be precise). It turned out that during the first half of the 1990s, the World Bank decided to allocate almost half of its loans to Mexico to social and environmental projects, beyond the narrow category of structural adjustment (Fox, 2000c). The main problem, in the World Bank's view, was no longer pushing through macroeconomic reforms but rather how to buffer their social costs and thereby preempt political opposition to the economic reform strategy. This contrasts with the conventional civil society impression of the World Bank's role in social spending, which assumes that the World Bank indiscriminately pressures reluctant national governments to cut social spending. This impression turns out to be very convenient for the national government, which prefers to shift the blame externally, but it turns out that the role of the World Bank is not so simple.⁵

If one reads the official World Bank (1995) documents that justify the so-called economic rescue operation in response to the peso crisis (documents now required to be public), one can see that the World Bank's main goal in social policy was not to cut, because it recognized the importance of investing in human capital, above all in basic health and education.⁶ The World Bank justifies these loans by saying that without them, the government would cut even more of the budget allocated to the poorest states. Where does structural adjustment come in? Instead of indiscriminate cuts in education and health, the World Bank's goal is more complex: to reform social policy by reallocating funds within each sector. This means cutting funds allocated to social programs for the urban working and middle classes to reallocate them to poorer, mainly rural groups (in theory). The World Bank favors this targeting of health and education spending to the poorest only because it does not distort private markets. In other words, providing only minimal services to the destitute does not take away any potential profits from private service providers. The very poor do not constitute a profitable potential market for private health or education service providers. Besides, with a little bit of schooling and better health, they will be better workers, so from this soft, technocratic logic, there is nothing to lose. At the same time, there is a lot to be said for ensuring that basic services really do reach the poorest instead of favoring urban and better-off groups, so one major question is whether the increased funding really does translate into effective, accountable service provision.⁷

The role of the World Bank in Mexico's social policy process was completely secret until recently, but since its information disclosure reforms, it is now known that a good part of the government's strategies in health, education, regional development, and rural municipal funds were closely linked to World Bank loans targeted to the poorest states (Chiapas, Oaxaca, Guerrero, and Hidalgo in particular). What is the government's main strategy in each of these sectors? Decentralization. Where did the World Bank fit in? The availability of World Bank loans gave added ideological and economic leverage to those sectors within the national government that promoted a rapid decentralization of social policies to the governments of the poorest states. This was a process of blind decentralization, however, because even in the World Bank's technical logic, there was no empirical evidence that those state governments had the capacity to manage health and education services with greater efficiency than the federal government. It turns out that after many years and literally billions of dollars in loans that the Mexican people will have to pay back with interest, it remains unclear just how effective those social investments have been. Why is it not clear? Because in spite of the World Bank's own policies, none of the large social sector loans included any measures to encourage reliable monitoring and evaluation of governmental performance, particularly the state and municipal governments now responsible for many antipoverty investments. This was consistent with the World Bank's general

pattern of focusing primarily on making loans rather than finding out for sure whether they fulfill their ostensible goal of reducing poverty in practice.

Summing up, to understand the broad changes in social policy in Mexico, one must develop an analysis that simultaneously takes into account the different levels of power, from the international to the national, state, and municipal. The vertical integration of policy analysis articulates processes of monitoring, evaluation, and analysis of all levels of official decision making at the same time, permitting civil society advocacy actors to develop strategies in real time rather than after the fact.

INDEPENDENT EVALUATIONS AS SOCIAL COUNTERWEIGHTS

My second proposition is that activists and analysts working on social problems have the opportunity to change the terms of the debate over public policies through the generation of reliable and convincing evaluations of the real performance of the public sector.

The rationale for this proposition is that the lack of reliable information about the efficacy and impact of these international antipoverty investments creates an opportunity to empower those organizations and intellectuals who could fill that gap. It turns out that both the World Bank and the Mexican government lack reliable and systematic information about the actual performance and impact of virtually all their social programs.⁸ At the same time, because World Bank internal culture and the staff's professional ethos are well-known for their worship of facts and empirical evidence that is considered legitimate, a gap is created that strategic advocacy initiatives can fill. When one presents credible facts that contradict the official story, it can be very difficult for World Bank officials to deny them, especially now that the World Bank has the remarkably autonomous Inspection Panel, which can pursue civil society claims of policy violations.⁹ Certainly, many multilateral development bank officials have a very limited idea of what kinds of facts count, but some also now give more credence to new concepts such as local knowledge. The viewpoints of the ostensible beneficiaries, if they are assembled systematically and presented strategically, can have increasing legitimacy in the halls of the multilateral development banks. These small advances have almost no influence on actual flows of funds, but they are relevant, above all to the design of new projects, which is the phase when bank loans are most vulnerable to civil society influence. This small, partial opening is the result of years of NGO campaigning combined with the struggles of insider reformists. At least some bank officials recognize that NGO and grassroots leaders know more than the officials do about the public sector's actual social and environmental performance.

Table 1 illustrates why there is a lack of reliable information about the real results of these large social and environmental investments. Table 1 is a conceptual map of the actors and institutions that either produce or have the potential to produce monitoring and evaluation of the real results of public policies. The goal of the table is to distinguish information producers in terms of both their autonomy from interested parties and their institutional capacities. The main point is that most of the information that policy makers receive about actual institutional performance is limited to a focus on inputs rather than outcomes, comes from interested parties, or is not based on systematic, field-based studies.

This information gap about public sector performance is well-known by the few policy makers at the top, but is little-known in civil society (thanks in part to policy makers' usually-successful effort to create the appearance that they have better and more information than the rest of us—a "wizard of Oz" effect). However, if advocacy groups point out to policy makers that they are aware of this information gap, then they can produce an "emperor has no clothes" effect.

Civil society actors can effectively fill this gap and take advantage of the credibility and policy leverage that may result. To do this, however, requires significant medium-term investments of human resources, and multisectoral coalitions may be necessary. For example, grassroots membership organizations are likely to have extensive information about the precise strengths and weaknesses of public sector service delivery but may lack the capacity to assemble these data in systematic ways that will generate the necessary credibility. It is one thing for clients of rural clinics to claim that service is poor, that the clinics usually lack basic medicines, and that doctors rarely appear. If grassroots leaders were able to sit down with health policy makers, however, they would have much more leverage if they were able to point to a survey of a representative sample of 50 rural clinics in a large region that shows that only $x\%$ had the basic complement of medicines, only in $y\%$ of the clinics did doctors appear more than once every 2 weeks, and $z\%$ of the doctors turned out to be abusive in some way. It would be very difficult for policy makers to counter with contradictory data because they do not ask those questions. To pull together their independent data, grassroots groups can benefit from partnerships with researchers, whether from NGOs, think tanks, or universities. By themselves, it would be very difficult for researchers to access the wealth of experiential knowledge that is already in the hands of large grassroots membership organizations. Although balanced partnerships between researchers and grassroots organizations are easier said than done, they are not impossible (specifying pathways to success goes beyond the scope of this essay).

Three other sets of potential partners are also key: (a) sympathetic public officials can provide key insights because they may have already identified key performance problems but lack the leverage to break bottlenecks, (b) interested journalists are key allies because public dissemination of the policy

Table 1. Conceptual Map of Monitoring and Evaluation Actors

	Interested Parties	Independent Sources of Monitoring and Evaluation (potential)	Comments
Multilateral development banks (MDB)	<ul style="list-style-type: none"> Operational MDB staff (responsible for supervising projects and financial flows) 	<ul style="list-style-type: none"> Technical departments of MDBs (social and environmental staff) MDB evaluation departments (relatively autonomous from operational authorities) 	<ul style="list-style-type: none"> Few projects are designed to include independent monitoring and evaluation Most studies rely on official data on "inputs" (money spent) rather than documenting impacts and services delivered
Governments	<ul style="list-style-type: none"> Government officials directly responsible for MDB-funded programs Government officials indirectly responsible (such as federal agencies that finance state and local governments) 	<ul style="list-style-type: none"> Government auditing and oversight agencies Semiautonomous evaluation units within government agencies 	<ul style="list-style-type: none"> Few governments have effective, autonomous oversight agencies, and they are generally limited to corruption rather than assessing effectiveness Few agencies have autonomous evaluation units, especially at state and municipal levels
National civil societies	<ul style="list-style-type: none"> Direct project beneficiaries (including both target groups and "unintentional" beneficiaries) Potential beneficiaries who were excluded 	<ul style="list-style-type: none"> Mass media (investigative journalists) University-based researchers Civil society organizations (nongovernmental organization (NGO) research networks and centers) 	<ul style="list-style-type: none"> Limited public access to official data on resources and allocation criteria Mass media are more adept at disseminating than generating and evaluating Universities and NGOs often lack the independent, medium-term funding needed to carry out and disseminate autonomous public interest research

monitoring information is key to increasing civil society leverage and to producing accountability impacts, and (c) private foundations are also necessary allies because independent funding is a key requirement for independent evaluations.

CONCLUSIONS

Transparency has become a widely accepted goal for national and international policy makers. Institutional practices, however, have lagged behind the increased acceptance of protransparency discourse. Transparency in the sense of making official documents and data public can be quite limited, however, from the point of view of civil society advocacy strategies. To guide their strategies, proreform actors within both civil society and the public sector need independently generated assessments of actual institutional performance.¹⁰

Drawing from diverse Mexican experiences, I have suggested in this essay that effective independent civil society monitoring of public policy processes requires vertical integration to monitor different elite actors simultaneously. Vertical integration is the coordination of policy monitoring and public interest advocacy efforts across different levels of the policy process, from the local to the national and the transnational arenas. Systematic, coordinated monitoring of the performance of all levels of public decision making can reveal more clearly where the main problems are, permitting more precisely targeted civil society advocacy strategies. Because policy makers' information about actual institutional performance is very limited, not field based, and drawn mainly from interested parties (especially in the case of large-scale, decentralized social programs), the resulting information gap creates opportunities for advocacy groups to use independent monitoring to gain credibility and leverage. In short, vertically integrated civil society strategies for increased transparency can bolster efforts to increase public accountability.

Notes

1. It is useful to reflect a bit about the word *advocacy*. It turns out to be one of those words that lacks a precise translation into Spanish (not unlike *accountability*). The literal translation of *advocacy* into Spanish is *abogacía*, which refers only to the practice of law. In English, *advocacy* refers more broadly to intervention with authorities on behalf of third parties. The concept also has broad associations with the pursuit of justice, including both civil and social rights (i.e., the more general public interest or citizens' interests). In terms of alternative Spanish words for *advocacy*, *gestoría* is an option, but the term has the disadvantage of appearing to be limited to seeking limited material concessions. *Promoción* could also work, but it refers to grassroots organizing in general, which may or may not involve policy advocacy. Some use the term *cabildo*, but this term refers mainly to lobbying, which is only one of several possible tactics for influencing public policy (not to mention the term's strong connotations of "influence peddling"). The term *incidencia*, meaning "to have influence on," is probably the most promising term in Spanish and is increasingly used by civil society organizations and policy makers in Guatemala and El Salvador (with support from the Washington Office on Latin America [<http://www.wola.org>]). These terms and definitions are worth exploring more systematically in the Mexican context now because both with a more independent Congress and with increasingly constructive Mexican civil society proposals for reforming public policies, civil society advocacy strategies have become much more relevant and viable than they were under the previous regime.

2. For further discussion, see Fox and Brown (1998). For further analysis of accountability and the World Bank, see Feeney (1998); O'Brien, Goetz, Scholte, and Williams (2000); and Rich (1994).

among others. For a conceptual discussion of the role of civil society in generating public accountability in Latin America, framed in terms of Guillermo O'Donnell's distinction between its horizontal and vertical dimensions, see Fox (2000a).

3. For an update on the persistence of authoritarian governments in the states of Guerrero, Yucatán, Tabasco, and Chiapas, see *Focus* (2001), among others. For context, see Cornelius, Eisenstadt, and Hindley (1999).

4. For details on the corn issue, see Commission on Environmental Cooperation (1999).

5. Previous researchers have tried to understand how public spending on social programs flowed through the system's complex plumbing, from the international level (the World Bank) to the borrowing government, down to the states, municipalities, and local communities. For updates on the World Bank in Mexico from the Oaxaca-based nongovernmental organization (NGO) *Trasparencia*, visit <http://www.trasparencia.org.mx>. This vertical integration concept and process emerged from a study published by Fox and Aranda (1996). For independent overviews of World Bank projects in rural Mexico, see Fernández and Adelson (2000) and Fox and Gershman (2000). For an update of the study of World Bank-funded local government accountability dynamics in indigenous regions, see Fox (2000b).

6. This loan was matched by another \$500 million loan from the Inter-American Development Bank. The World Bank project document is available through the World Bank's Public Information Center as a result of the public information disclosure reform that came into effect in 1994 (Udall, 1998). On the international debate over how to increase World Bank transparency, see Bank Information Center (2001b). Founded in 1987, the Bank Information Center is a Washington-based NGO that promotes citizen participation, information disclosure, full adherence to environmental and social policies, and public accountability of the multilateral development banks.

7. For feminist NGO critiques of the World Bank's approach to health and education policy in Latin America, see Frade (2000).

8. According to the most comprehensive internal World Bank assessment of its own policy: "It has been Bank policy since the mid-1970s to promote monitoring and evaluation (M & E) of project implementation. . . the overall results of the 20-year M & E initiative have been disappointing. . . the history of M & E in the Bank is characterised by non-compliance" (World Bank Operations Evaluation Department, 1994). See also World Bank Operations Evaluation Department (1995), which found little improvement. For further discussion of the challenges involved in generating reliable independent information on World Bank project processes and impacts, see Fox (1997).

9. For more on the Inspection Panel and World Bank social and environmental policies more generally, see Center for International Law (2001) and Bank Information Center (2001a), as well as the Inspection Panel's (2001) own Web site. See also Bretton Woods Project (2001) for more links to advocacy organizations.

10. Moreover, in spite of the widespread enthusiasm about the concept of transparency, it is important to keep in mind that transparency is necessary but far from sufficient for accountability. Some definitions of accountability even conflate the two concepts, even though transparency that reveals transgressions and impunity often does not lead to accountability. To conflate means (transparency) and ends (accountability) could make it difficult to get at the key analytical problem, which is to explain the conditions under which transparency does effectively contribute to accountability. For further discussion, see Fox (2000a).

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