



OUTCOMES OF THE DISCOVERY AND ENVISIONING PHASE OF CESR'S STRATEGY PLANNING PROCESS

9 March 2020

INTRODUCTION

Over the next three years, our goal is to build up a compelling body of work, framed by our mission, that helps transform the power structures driving the intersecting crises of socioeconomic inequality and climate change. To achieve that goal, it is important to identify where our unique expertise could be most usefully focused, so that we can best serve collective efforts within and beyond the human rights field. For this reason, we dedicated the first phase of our strategy planning process to 'Discovery and Envisioning'. This is essentially the research phase of the process. It is centered on listening and learning, in order to test our assumptions and seek out new perspectives about CESR's role and added value. In this context, we identified 'burning' questions we want our next strategy to answer, including:

- How do we systematize and build up our work on inequality and climate justice?
- Where should we prioritize our locus of work, sites of advocacy, and modalities of action?
- How could we better measure and communicate our work, impact, and learning?
- Does our current programmatic structure serve us effectively?
- How can we strengthen the synergies between our programmatic and operational work?

In order to answer these questions, we need a clear picture of current and emerging opportunities and threats—in the external environment and in the fields in which we work—as well as of our internal strengths and challenges, which shape our capacity to respond.

We have taken an iterative approach to this research, involving a mix of internal reflection, external consultation, and board engagement. Our internal reflection has included collectively identifying strategic questions, taking stock of our previous planning cycle, and workshoping an organizational theory of change. Our external consultation began with a short open survey, to which we received 30 responses, followed with 20 more in-depth interviews with key allies, partners and funders, and four small group conversations (involving 15 participants in total) specifically on linking socioeconomic rights and climate change, with advocates from around the world working at the intersection of these issues. We've shared and discussed our observations from these activities with our team and board and convened a small reference group, which acts as an informal 'sounding board' to share what we're learning from these activities, discuss how to interpret our observations, and brainstorm how they should inform our strategy.

This note sets out the findings of our research. The first part assesses external opportunities and threats, as well as internal strengths and weaknesses. The second part discusses the implications of this assessment for our planning. It focuses primarily on the first two burning question, given that these were the primary focus of our external consultations. However, it does also note where our thinking has advanced on the three more internally focused questions.

PART ONE | ASSESSMENT

Trends in the political and economic landscape

Trends identified through internal brainstorming and external consultation (survey and interviews) which have a particular bearing on our future strategy include:

- *Rising inequality:* debates about the failures of neoliberalism—and the inequality and climate crises they give rise to—are becoming increasingly mainstream in public opinion and political discourse. While this presents an opportunity, the framing of the debate is often polarizing. In Latin America, for example, efforts to reduce inequality have involved transfers from middle to low income classes, while elites remain untouched. The right-wing is successfully capturing grievances against inequality ‘and channeling it towards something different than what you’d expect’, as one interviewee put it.
- *Weakening democratic governance:* the rise of authoritarianism is a narrow framing of a broader backsliding of and loss of trust in democratic principles and practices, on which many ideas of how to progress human rights are premised. Decision-making power in the economic arena is highly concentrated; this makes it less responsive to demands for redistributive policies and means human rights and development oversight mechanisms have little influence in most contexts. Public opinion in many contexts is swaying beyond the neoliberal, to the openly anti-democratic hard right.
- *Corporate capture:* the power the private sector has over the state is both pervasive and hidden. Corporate actors (i.e. private companies but also corporate management consultants, accountants, lawyers etc.) are occupying spaces related to the delivery of public goods and services that would have previously involved public officials taking decisions. This is seen very clearly in the field of education, for example. These trends, which are fueling privatization, are also interlinked with the state undermining its own capacity. Similarly, at the international level global development is increasingly captured by ‘techno-solutionism’ and private sector interests.
- *Increasing public concern about the climate crisis:* extreme weather events are likely to have an increasingly direct impact on people’s daily lives, particularly the most disadvantaged. At the same time, the burden of fighting climate change may well be placed on ordinary people, without putting in place the alternative systems and structural changes needed to address their vulnerabilities. In this context, climate concerns risk taking over other socioeconomic issues on political agendas, although they also provide entry points for advocacy on the need for structural socioeconomic transformation.
- *Technology, digitization, and the future of work:* although flagged less often, technology— particularly digital and artificial intelligence—was seen as an important new field for research and advocacy on human rights. Policy alternatives to deal with the displacement of workers by automation and artificial intelligence will affect labor and social protection, for example. Human rights concerns around data privacy, algorithmic decision-making and media manipulation were also raised.
- *Declining multilateralism and geopolitical shifts:* as some of the world’s most powerful countries continue to undermine key multilateral institutions and processes on human rights, development and the environment, allies engaged in these processes expressed increased frustration with their skewed dynamics, ineffective outcomes and barriers to meaningful participation. Geo-political shifts, including the rise of the Global South and China’s increasingly dominant role in the global economy, international trade and development cooperation were flagged as a trend ‘to watch’ and as an opportunity to bring in questions of justice into conversations about economic growth.

- *Rising protests and shrinking civic space*: drivers include growing civil unrest and widespread protests against social crises, including in contexts of austerity, growing inequality and deteriorating public services. Declining trust in mainstream political parties and traditional channels of democratic participation mean more people resorting to street protests to put demands on their governments, which then crackdown in response. Foreign funding restrictions are hampering the work of national organizations and, as multiple interviewees commented, activists working on socioeconomic rights are being targeted more; 10 years ago they received less attention, but now the pattern is changing; their work as seen as “embarrassing” governments; corporate power is driving this.

Conversations about these trends stressed: the importance of seeing the **intersections** between them, which are sometimes **paradoxical**; the need to interrogate the **underlying drivers** in common; that their significance could be **interpreted differently**, either as a sign that a major positive shift is coming or that the status quo will worsen, and that this state of flux is creating a lot of **fear and insecurity**; the **variation** in these trends in different contexts; and that their **breadth** means they’re too much for any single organization to tackle, so it’s necessary to unpack how they inform our decisions of where to prioritize.

Trends in the human rights field

There was broad agreement that, despite some significant progress, for the most part human rights activism has so far remained marginal to efforts to advance economic justice and climate justice. The human rights field hasn’t been able translate these issues into a new agenda for advocacy, noted one interviewee. ‘How is that when people are in the streets banging pots about inequality, jobs and taxes, there’s little connection to the work of human rights groups, the frames we use and spaces we engage in?’ asked another. Some reasons the human rights formulation of these issues isn’t gaining as much traction as we’d like include:

- *Fragmentation and silos*—even though there’s been an explosion in terms of numbers of organizations and, arguably, even increased efficacy at the ‘thousands of coalfaces’ groups are working at, as one put it, there was a sense among interviewees that greater specialization and technicalization means the focus is on symptoms and not causes and that this siloing and ‘tunnel vision’ has weakened civil society overall. Fragmentation between civil and political rights and socioeconomic rights was seen as the “Achilles Heel” of the human rights movement, as one interviewee put it, driven by a lack of political leadership and even, in some instances, ideological disregard for socioeconomic rights by powerful international NGOs. Other factors that interviewees saw as driving fragmentation include a weakened ‘sense of internationalism’, which means national struggles become quite parochial; the decreased power of trade unions and of the organized working class, which means civil society organizations have ‘lost a pole to gravitate towards for power’; underdeveloped political economy and root cause analysis, because few people are doing work to ‘follow the money’; and the lack of ‘unified messaging’. Another common theme was the need for human rights actors to create more effective linkages with social movements, particularly the feminist and labor movements, though there was also recognition of the challenges of doing so.
- *Abstraction*—interviewees commented on perceptions that rights are ‘abstract’ and ‘not connecting to people’s grievances’, that there’s a ‘vast gap between normative progress pushed by NGOs at the international level and what is understood by local activists’, and that the concept of socioeconomic rights risks coming across as opaque in contrast to referencing specific rights such as health, education etc. A related issue flagged is that the human rights field is ‘tied to and revolves around a relatively stable normative framework’ and ‘at times the desire to stay true to it has meant we’ve been slow to describe inequities people experience in human rights terms that don’t feel technocratic’. As one interviewee noted, ‘the human rights sector is somehow apolitical, and yet the fundamental driver of

these violations is power—economic, social, political and cultural’. An opportunity to avoid being perceived as technical, depoliticized, elite and, in some instances, ‘Western’, is ensuring that collective work ‘is genuinely registering the analysis from grassroots groups and is responsive to and accountable to it’, which is not the same thing as ‘inviting someone to share their story as illustrative of a wider trend that has already been defined in a different analytic space’, as one interviewee outlined.

- *Unclear vision for change*—as one interviewee outlined, there’s now an increasing rejection of capitalism, but no clarity about what should replace it—we lack a ‘galvanizing vision and a roadmap of how to get there’. Another stressed that ‘we can’t get anywhere until ordinary people see how the economic set up is not in their interest and they have a right to expect more’ but, to do this, we need to ‘speak about improving the future of communities in language that resonates’, which is not something the human rights field has done so well. Recognizing the reasons people act against their economic interests is also important. ‘We need to get a better grip on the nuanced relationship between the rise of authoritarian, fractured political systems and the denial of social rights’ said one interviewee. Another noted that while the human rights field has ‘deep deep strength in research and policy analysis and the naming of violations’, we’re not as good at capturing the *narrative* of what is wrong and ‘what human rights realization would look like’. However, some thinking on narrative is advancing—an opportunity a number of interviewees noted.
- *Risk of overshadowing by the emerging economic justice field*—one interviewee expressed concern that without more effective engagement with the ‘increasingly strong’ economic justice field, the human rights field could be ‘overtaken’, which may shift funding away from human rights actors working on economic justice. Others were of the opinion that while there’s been some engagement with human rights in this context, it’s been relatively superficial, in part due to a ‘reluctance to engage with economic system’ and a ‘fear of appearing too political on these issues’, because ‘what’s right and wrong is less clear’. As one interviewee put it, because recognition of socioeconomic rights obligations often isn’t translated into sufficiently concrete policy ‘demands’, many civil society groups “found the armory bare” after the global financial crisis.
- *Weakening influence of ‘traditional’ advocacy approaches*—regression in government commitment to human rights and outright rejection of them is becoming “normalized”. The ability of human rights activists to open up civic space, channels of influence, and diplomatic opportunities shrinks as a result. Examples interviewees gave include civil society being kept out of multilateral processes; human rights language being taken out of key global agreements; previous champions being more tepid; human rights defenders being villainized and discredited; the sophisticated “misuse” of rights discourse (e.g. by conservative groups to attack sexual and reproductive rights and migrants rights); and the limited uptake of and the difficulty of mobilizing people around ‘technocratic’ tools, such as impact assessments, litigation and other forms of quasi-judicial accountability. Some interpreted this as a ‘big change’ in the advocacy landscape. Nevertheless, there’s less clarity on the implications of this. ‘There’s so much same-old same-old, because we’re not sure what else to do’ noted one interviewee, adding that ‘there’s no good strategy on how to move forward with these processes, but also on how and when to withdraw our participation when they’re not working’.

However, while there’s pessimism about ways of working and assumptions about what’s effective, interviewees engaging with activists still had a sense that they see rights as a useful and relevant framework for advancing economic and social justice. For example, groups on the ground ‘are much more holistic’ and ‘draw on more’ when they’re describing the abuse they’re up against, noted one. This means we’re seeing work evolving and becoming ‘increasingly systemic in what they’re trying to take on’. Using a rights framing facilitates empowerment and community ownership of advocacy, explained another.

A particular opportunity for more systemic thinking, which a number of interviewees flagged, is how human rights can help ‘to delineate what the role of a strong and effective state is in delivering on the public interest’. Human rights centers responsibility for delivery on the state, even if private sector is involved, so narratives around an effective state and narratives around alternatives to neoliberalism can be grounded in human rights. Human rights help in a diagnostic way, e.g. by ‘naming and shaming’ myths such as the ‘whole “bootstraps” narrative’, the flawed logic of structural adjustment or the dogma of ‘private sector effectiveness’. It also helps in a propositional way (i.e. in explaining who the economy is for and what is it we expect the state to deliver). Put another way, rights need to be both a shield (a protection against retrogression) and a sword (the basis for a galvanizing vision). This could be a huge value to campaigns for economic justice. Others saw opportunities to engage the corporate sector, e.g. ‘moving from shareholder to stakeholder—what does that mean in human rights terms?’, asked one.

Human rights actors reflect the same weaknesses as society (e.g. power hierarchies) which shape priorities and strategies, as one interviewee stressed. Other comments flagged opportunities to challenge those hierarchies, such as the fact that challenges are ‘pushing activists to be really creative in terms of what’s effective, where to put their energies etc’ and ‘the sense that there are real moments of opportunity to align with movements that have a progressive vision of justice’. We’re also seeing ‘a reenergized feminist movement resurging as gender equality gains face backlash’, a number of interviewees noted. The movement is increasingly engaging beyond “women’s issues”. For example, groups are bringing a gendered lens to macroeconomic policy and prioritizing economic justice in ‘recognition that we need structural transformation of systems oppressing women, including neoliberalism’.

Our capacity to respond to these trends

CESR is a small organization with a broad mandate. Our mission is ‘to work for the recognition and enforcement of economic and social rights’ worldwide. Our current goals are framed broadly as ‘advancing economic policies which disrupt inequalities and realize human rights’ and ‘strengthening analysis and advocacy on the root causes of socioeconomic rights deprivations and economic inequality undertaken by our partners’. The change we seek in pursuit of these goals is multidimensional (changes in policy, norms, discourses and capacities) and multilayered (weaving across the global, regional, national and local levels). We use diverse strategies and tactics to effect these changes (including research, advocacy, developing skills and building alliances). As discussed further below, this breadth is both a strength and a challenge.

Strengths

- *Responsiveness to emerging trends*—raising awareness and getting attention on an emerging issue was an area where we saw notable impact in the last strategy cycle. This speaks to our ability to recognize and shine a spotlight on the human rights dimensions of different socioeconomic trends that other human rights actors are not addressing. An example that one interviewee gave was the letter the United Nations Committee on Economic, Social and Cultural Rights sent to all States party in 2012 setting out criteria for avoiding retrogressive austerity measures (which was, in large part, a direct response to our advocacy). It ‘really was groundbreaking’ because it ensured the human rights framework ‘was nimble enough to respond when people were looking for answers about what economic policy should look like’. Another example is CESR’s deliberate foregrounding since 2015 of economic inequality and corporate capture as salient trends affecting human rights and development.
- *Skill in pushing the boundaries of rights discourse and normative development*—comments from interviewees included ‘linking fiscal policies and human rights is something you’re so strong on’, ‘the work that CESR has done around austerity is one space where we’ve really confronted the silo between

human rights and economic justice'. The standard setting work in Latin America was seen as strategically responding to a need and opportunity in the region to provide policy-makers, human rights oversight bodies and civil society groups of all kinds with clear guidance on what rights-respecting fiscal policy should look like. A strength of CESR is its capacity to spell out in concrete and accessible terms the practical policy implications of abstract human rights principles.

- *Expertise, rigor and quality of analysis*—comments from interviewees included that ‘the work done by CESR on research and data collection is just exceptional’, ‘CESR has been doing incredible work with not a huge staff—in every single thing I’ve read over time it’s the same high caliber’, CESR’s technical rigor and depth of human rights analysis on fiscal issues is second to none, and fills a real gap’. As one explained, our “wonkiness” is a good thing. The wonky folks are in mainstream institutions. But there’s ‘participation overkill’, which means often NGOs spend too much time ‘going from conference to conference’ and not enough time doing proper analysis. Their statements aren’t wonky enough. So, people are talking past each other. CESR’s analysis can bridge that gap.
- *Ability to support international advocacy with country research* – as one partner said, CESR is able to ‘connect the dots’ and build a compelling narrative about human rights and fiscal policy at the global level because of the in-depth examples it draws on from different contexts. “CESR plays a really important role in engaging in international and regional processes which it’s harder for national NGOs to engage with, whether the SDGs, the IACHR or the IMF. You’re taken seriously in those spaces because of your diverse country experience and high technical quality.”
- *Fluency in operating beyond the human rights sphere* – In recent years, CESR has increased its profile beyond the human rights arena, taking its advocacy to development and economic governance spaces to a degree unusual for a human rights organization. A number of those interviewed commented on CESR’s ability to transmit human rights messages in ways that communicate with non-human rights audiences, as well as in interpreting development and economic policy concepts and paradigms through a human rights lens. As one put it, ‘you’re a bridge, an interlocutor, an interpreter; few rights groups play that role’.
- *Unique partnership model*—we pride ourselves on our cooperative approach to partnerships, which ensures each partner’s role is equally valued, but clearly differentiated, and provides well-structured coordination methods. This is a feature of our work that almost every interviewee praised. Comments included that our model is ‘really trusted’ and that our credibility and integrity come from carrying out work in a principled way ‘with partners up front’. One interviewee who has engaged with us as a national partner elaborated that our model is good practice because it’s not about going somewhere ‘just to take’, it’s about co-creating ‘something new’ by combining expertise and bringing it into different spaces. This means we ‘bridge’ knowledge, methods, groups etc. Interviewees also appreciated the values that CESR staff modelled in their interactions with partners and allies.
- *Working collaboratively and valuing movement building*—another area we saw progress on in the last strategy cycle was on building collective energy on the issues we work on, including by expanding partnerships and alliances, inspiring new champions or supporters, and improving alignment (e.g. on message, shared goals etc.). CESR’s ability to work across disciplinary boundaries fostering complementarity is an asset in addressing the “siloeing” and “overshadowing” trends identified above. This collaboration was seen as ‘absolutely vital’ and we were praised for always trying our best to put our ‘shoulder to the wheel’ and for ‘not having sharp elbows’. ‘You’ve been really good at corralling different forces and making things happen without getting too caught up in branding stuff’, noted one interviewee. Another commented on our ‘clear appreciation’ of the importance of social movements,

noting that not all human rights NGOs ‘get that’ or feel ‘quite daunted’ by it or ‘don’t feel they’re in a place to engage with them’.

- *Bringing a didactic dimension to our work*—stocktaking of the last strategy cycle and survey responses affirmed we’ve impacted partners and allies by: arming them with rights-focused analysis of problems such as austerity, tax abuse and unsustainable development; offering a “new angle” or “critical” perspective on these problems, as well as progressive solutions grounded in human rights; strengthening their capacity to engage with these issues by enhancing the way they approach research and advocacy.

Challenges

- *Programmatic diversity and dispersal of focus*—CESR has carved out several niches simultaneously. This poses challenges for the clarity of our organizational identity and profile. It also means we’re often overstretched and, as a result, not always able to maximize our impact. For example, the stocktaking exercise showed that we planned 24 projects and 150 activities in the past cycle. However, the objectives guiding these projects were framed at quite a “high level”. This makes it difficult to link activities, outputs, outcomes, and impact. As a result, we lose some balance and complementarity between projects and the pursuit of a program objective gets fragmented.
- *Communication*—we released 45 publications in the last planning cycle, most of which were analytical publications that are very intensive to produce but that generally reach a relatively niche audience. Our most viewed publications are more didactic and provide analytical tools; this is something we see ourselves as being uniquely positioned to do. To better maximize the impact of our publications in the next planning cycle, one important strategic question is how we can dedicate more time and resources to dissemination. This could include producing more informational publications that are shorter and more accessible, to help communicate the ways we’re experimenting, learning, and innovating to a wider audience. Our work is difficult to communicate in a nutshell and in a way that resonates beyond a niche audience; we are not immune to the challenge of abstraction. “It takes a while to understand what CESR does: your niche is necessarily complex and defies easy encapsulation”, said a funder. We see a need to link our work more effectively to topical events and broader economic and social justice debates; develop more human-centered narratives and stories, that draw more on our partners; and set more specific communications objectives that are better aligned to our programmatic and fundraising objectives.
- *Measuring and tracking impact*—developing effective systems to measure and track our impact has been a longstanding challenge. In part, this is due to the nature of our work, which contributes to collective efforts and so often results in indirect and longer-term impacts. But we also lack a well-developed system for monitoring and evaluation. We struggle to identify compelling outcome indicators and consistently populate monitoring and evaluation frameworks with data. Evaluation and learning are crucial to plan more realistically, better manage workload and hold ourselves accountable.
- *Aligning organizational structure with strategy*—while our modalities of action are interconnected and mutually reinforcing, they have not always been consciously aligned, in part due to a different emphasis in each program. As a result, our tactics have sometimes felt fragmented, reactive or scattershot, with the risk that “means” (e.g. trainings, reports or advocacy events) become “ends” in themselves. The main structural alignment this cycle (the integration of the development and economic policy programs) has resulted in a sharper focus on fiscal policy and more selective engagement with Agenda 2030. But staffing constraints have restricted our ambition to expand into areas of social and environmental policy, as well as to explore other dimensions of economic policy beyond the fiscal.

PART TWO | IMPLICATIONS FOR PLANNING

A key goal of the strategy process is to provide a coherent frame that brings together disparate elements our work into a holistic and focused picture. To that end, a key exercise in this phase has been to more systematically formulate a Theory of Change for the organization. This has prompted us to clarify what success looks like—e.g. in 5 or 10 years—and to unpack our assumptions about what it’s going to take to fully realize socioeconomic rights, taking into account external opportunities and threats, as well internal strengths and weaknesses. In many ways, the process of formulating a Theory of Change is as important as the final product. This has certainly been the case for us. Workshopping the draft has raised a number of fundamental questions about the relationship between strategies and outcomes, which the assessment outlined above helps to shed light on.

Systematizing our Focus

A first question is how we might clarify the central, underlying problem we’re focused on, and the solutions to it that our strategy will advance. We’re not consistent in describing this problem as the denial of socioeconomic rights (as flows from our mission statement) or as poverty and inequality (as framed in our current strategy statement). It’s important to distinguish which is in service of the other, to avoid framing problems and solutions in ways that tend towards abstraction.

Centering resource distribution

A re-articulation we’ve explored with the Reference Group and others is that CESR works to tackle the grossly unequal distribution of resources and power at the core of chronic socioeconomic rights deprivations and inequalities. We do so by building robust civil society counter-power to advance redistributive policies and economies respectful of people and planet.

There was a lot of enthusiasm for focusing our work on resource distribution. Interviewees described it as ‘good use’ of our comparative capacities; ‘very natural’, given that there’s already a lot of respect for CESR in those spaces; and as giving us a ‘particular identity’ and ‘niche’ that would be really constructive in finding allies and make decisions about the ‘footprint’ we want to have, in light of our limited resources. As one noted, the economic justice angle is ‘what people look to you for as well’. ‘You would bring a lot of insights to work on inequality by linking it to economic policy and human rights’, noted another. Several interviewees welcomed this framing as it would enable CESR to address the question “why is this happening” more explicitly in our work. ‘Austerity policies etc are not accidental or simply misguided; they’re deliberate’, said one. ‘You can show that it’s a choice: a set of decisions and structures that make inequality happen, and that it’s the same playbook in every country,’ said another.

A funder commented that this formulation could help overcome the challenge of abstraction, foregrounding the real-world problem we’re tackling rather than the nebulous concept of ESC rights which are part of the solution. Another advantage of this framing is that it ‘is still broad enough to make resources available to an array of struggles on the ground’. This is important because ‘examples of where I’ve seen human rights language used to critique particular economic decisions are still few and far between’.

A number of people commented that this framing responds to ‘the moment we’re in’. The IMF has even said that inequality is bad for economic growth, noted one interviewee. If the IMF can say that, why can’t a human rights NGO? Another commented that while there still might be pushback against naming capitalism as the problem, there is growing recognition ‘that the economic system has gotten us into this mess and needs to be addressed’.

Bringing in a climate lens

There has been equally enthusiastic feedback on our intention to tackle climate change more directly in our work, although a less clear steer on where concretely our contribution would be most valuable. Our efforts to engage in an initial dialogue with climate justice advocates from around the world has been warmly welcomed, as has the manner in which we have sought to familiarize ourselves with the field and identify our complementary value-add. Nevertheless, a number of interviewees flagged that this would be a ‘quite a significant pivot’ and a ‘very heavy lift’, cautioning that it might be difficult ‘to really identify and then establish a niche’. As one elaborated, working on climate change requires knowledge and expertise ‘in a huge new area’, which may be difficult to build up quickly in a small organization. Interviewees encouraged us to bring our ‘own identity’ to this work, which means making the link to the areas where we already have expertise.

This is in line with the tentative entry points that we have been exploring in the consultations, which include:

1. Unpacking specific ESC rights obligations of particular relevance to climate change, particularly “maximum available resources” (MAR) and extra-territorial obligations (ETOs).
2. Undertaking in-depth analysis that assesses, for example: (a) how failure to take (adequate) efforts to reduce emissions violates human rights; or (b) the human rights compliance of specific climate-related policy measures (such as mitigation; climate financing, including environmentally focused fiscal policies; or climate-adapted social protection systems).
3. Supporting climate justice activists in (a) building evidence for litigation or other accountability efforts; (b) having a voice and presence in key international forums; and (c) constructing holistic, intersectional agendas for green socio-economic transformation.

Allies working at the intersections of human rights and climate change saw all three as useful entry points, with particular interest in us potentially focusing on the fiscal dimensions of climate change, adaption and mitigation, as well as in ‘bringing a nuanced human rights analysis to proposals for Green New Deal-type proposals calling for a fundamental restructuring of economic and social arrangements’. Further scoping will need to be carried out to identify specific areas and initiatives where we could most usefully contribute.

Other complementary focus areas

Other dimensions of the issues we work on that survey respondents and interviewees felt were integrally related to the issues CESR already works on, and on which they felt CESR could have an impact, included:

- *Indivisibility of rights*—while there’s no question that socioeconomic rights are our forte and where we need to stay, part of that agenda needs to include how those rights connect and link up with an expansive understanding of civil and political rights that takes into account ‘a broad conception of dignity’, as one interviewee put it. It’s a good time to look at interconnections between and really test the theory of indivisibility, urged another.
- *Business and human rights*—given our efforts to reform the rules of corporate taxation and our work on corporate capture, including in development financing, we could ‘inject our unique perspective and make our presence more felt’ in the business and human rights field, given that the tax angle is almost always missing in that field.

- *Other economic and social policy issues*—international trade agreements; the nexus with labor rights (including perceived trade-offs with climate mitigation efforts); infrastructure development; and social protection floors.
- *Discrimination*—humanizing and sharpening the discrimination lens of our work by focusing on specific affected communities (e.g. indigenous peoples, PWD, migrants, LGBTQI people); emphasizing systemic discrimination (e.g. on basis of race and class), which tends to get hidden; and bringing out the gender dimensions more strongly across every area of our work.
- *International standards on the taxation of wealth*—helping to shape and promote proposals from progressive economists and tax justice movements to whom we are allied.
- *Countering corporate capture and its ramifications for inequalities*—advocating for regulatory measures that counter, for instance, the mechanisms that lead to wealth concentration or the impact of lobbying by MNCs on the capture of fiscal, economic or environmental policy.
- *Promoting economic alternatives*—bringing ‘positive ideas’ and highlighting the ‘viability and logic of alternative policies that redistribute wealth and power upwards’.
- *Labor rights, the working poor and informality*—bringing a human rights perspective on the relationship between labor policy and tax mobilization, social protection systems, minimum income schemes etc.
- *Industrial policy*—lack of economic diversification diminishes opportunities to enjoy rights because the state is reliant on a narrow revenue stream, which increases the power of the elite.

Many of these have a direct bearing on—and could be woven into our framing of—resource distribution. Nevertheless, the focus areas set out are still huge “buckets” of work. We could consider prioritizing one or two, then explore how others relate to those. Another suggestion was that neoliberalism could be a “thread to weave” though, as a way of conceptualizing our current economic model that not delivering. ‘You can take a particular thread of the problem (e.g. fiscal injustice) over the next few years and look at how it plays out in different situations, but through the same lens’, suggested one interviewee.

Conceptualizing our role in bringing about change

A second question is how we might conceptualize our role in bringing about change more clearly. In our past cycle, policy-change was a key goal. Yet this is a long-term result, achieved infrequently, and rarely attributable to the work of a single organization. We need to better articulate what stages or aspects of policy change we are affecting (particularly in national-level policy processes where our partners will usually play the frontline role). We also need to reflect further on how the dimensions of change we seek contribute to creating conditions for policy change. For instance, in our initial “theory of change” outcome mapping exercise, “improved policy environment” sits alongside “amplified collective power” and “responsive institutions” as distinct but mutually reinforcing outcomes of CESR’s work to strengthen accountability for human rights obligations in the medium term. This recognizes that CESR rarely leads efforts targeting a specific policy reform. Rather, we seek significant changes at more fundamental levels, generating activist demand for accountability and opening up more effective routes to channel these demands to the institutions responsible for acting on them.

A key way we do that is by mobilizing and bringing together a range of allies around a shared ‘body of knowledge’ and ‘tactical repertoire’ that informs collective advocacy, for example on fiscal policy. In other words, we most often act as a resource base, capacity-builder and connector of national and global civil society. Nevertheless, it’s important to be nuanced in describing engagement with civil society, as one interviewee flagged; not all of it is on our side. At the same time, CESR also plays a leading role in some contexts, for example in advocating for new policy commitments, particularly at the international level, as well as in regional or international standard-setting initiatives that aim to create a more responsive

institutional framework for policy change. There is a clear connection between these dimensions of our work. As one interviewee put it, ‘it keeps you honest and in touch in a really authentic way; you can come forward with your analysis in a way you couldn’t if you weren’t playing that other role’.

A key question for us going forward is how these three outcomes (and the work we do to achieve them) can be more strategically aligned and whether, in light of the trends outlined above, we should prioritize between them. As visualized in the Theory of Change outcome map, we see these outcomes as mutually reinforcing, in principle. But we also recognize that in many contexts our ability to shift the policy environment is extremely constrained, and that strengthening the responsiveness of human rights accountability institutions will have limited impact on the change we seek, given the challenges identified in the trends analysis. In deciding where to devote our efforts, it will be important to take into account the specificities of each context and the dimension of change CESR is best placed to influence. The sections below highlight some of the consultation feedback we received relating to these distinct dimensions.

Shifting the policy environment

As outlined above, we’re known for our interdisciplinary research, methodological innovation, rigorous analysis and in-depth findings. This research underpins strategic advocacy that aims to **advance thinking and debate** by **defining** fiscal policy as a critical socioeconomic rights issue. In particular, CESR has built significant expertise and profile in **articulating the added value of human rights** in advancing redistributive fiscal policy. This has enabled CESR to contribute to **agenda setting** in specific national settings (eg the repeal of the health-related austerity decree in Spain in 2018), and to help secure relevant policy commitments at the international level (eg the language on progressive fiscal policy and inequality in SDG10). CESR has also helped **frame the fiscal policy proposals and recommendations** put forward by international organizations and actors with greater influence on decision-makers, such as ICRICT (on new corporate taxation standards), the IMF (on the integration of gender inequality in its country team recommendations on fiscal policy). The regional **standard setting** initiative in Latin America is aimed at providing detailed guidance to decision-makers on the formulation of fiscal policy.

While our ability to bridge across the national, regional and international levels is a strength, an important question regarding our role in shifting the policy environment is what counts as appropriate use of our power and positioning? There’s an element of *realpolitik* to this question, one interviewee explained. We need to recognize where the centers of power are that we’re trying to influence; when centers are international (as many are in the economic arena) we have to think about who is best placed to confront power and advocate for influence. While national groups think their perspective has to be heard, they don’t always think they’ll be the most effective voice. We have access and leverage being based in the Global North. An example highlighted by one interviewee was the role we played during the SDG process; human rights ‘wouldn’t have gotten in’ if we were not in those conversations at the UN level.

As one interviewee put it, ‘when large organizations leave a space, that space loses its power’. However, these global-level initiatives can require a heavy investment and their actual impact in specific contexts is often indirect or difficult to discern. We have discussed maintaining a higher threshold for selective engagement with international human rights mechanisms and the potential of making deeper forays into the most relevant global economic governance arenas. For example, our assessment of the serious shortcomings of the development agenda over the last five years means that our engagement with SDG processes international (and related national processes) will continue to selectively focus on the most strategic opportunities for advancing a systemic critique of dominant development paradigms and proposals for tackling socioeconomic and environmental inequalities.

Further, a number of interviewees flagged that it is important for international organizations based in the global North like CESR to show we have meaningful partnerships and that there's collective interest in us engaging in global advocacy spaces. There was broad agreement that part of the reason we have legitimacy in international spaces is because we bring concrete country-level findings, illustrative of broader trends, into global policy spaces. That, in turn, depends on mutually beneficial partnerships with national groups. Moreover, it was noted that global forums are often the place where CESR can hold wealthy countries and IFIs accountable for their role in undermining human rights in the global South. Given CESR's location, identity and composition, it is well-placed to address the transnational dynamics of economic injustice from the hubs of power to which the organization has access. 'CESR has a niche in tackling the international dynamics thwarting progress on these issues, focusing on the role of global north governments and IFIs in skewing multilateral processes', as one interviewee outlined.

Making the institutional framework more responsive

Much economic and social rights advocacy centers on strengthening the legal and institutional framework needed, at the national and international level, to give effect to these rights. As many recent analyses have indicated, this framework is still under-developed in comparison to civil and political rights. Moreover, as one long-standing ESC rights advocate pointed out, 'our efforts to constitutionalize and litigate ESC rights, and develop sophisticated measurement techniques, are important, but will continue to have limited impact unless we overcome the assumption by most governments that they are rights of inferior status'.

An important strand of CESR's work has been to make human rights accountability mechanisms more responsive on the issues we work on, including promoting the development of normative guidance on fiscal policy and the obligations of states with regard to resource generation and distribution. In the past planning cycle, almost half of our projects involved engagement with a human rights oversight body, including treaty bodies and rapporteurs (predominately international, but some regional). Our influence over these bodies has been significant, with treaty bodies frequently taking up CESR's concerns and making bolder, more specific recommendations to states than they otherwise would, based on the evidence we put before them. However, the limited influence of human rights accountability mechanisms over economic matters has increasingly prompted us to rethink our reliance on this more traditional advocacy approach, without pivoting away from these institutions entirely. The potential of other human rights oversight institutions, as such as courts, parliamentary bodies, and national human rights institutions is also recognized, though highly context specific.

Nevertheless, CESR has also made a deliberate strategic choice to bring human rights arguments and evidence to development and economic governance forums and oversight bodies, including those established under Agenda 2030 and the Bretton Woods institutions (particularly the International Monetary Fund as a key player on fiscal policy). A number of partners and allies interviewed stressed the significance of CESR opening up these avenues of accountability beyond the human rights sphere, pointing out that few other organizations had the expertise or inter-disciplinary fluency to play this role. Nevertheless, the resistance of the IMF and World Bank to recognizing human rights as part of their mandate has meant our advocacy before them has had limited results in terms of behavioral change by these bodies. Similarly, the weakness of the Agenda 2030 review and monitoring mechanisms has rendered our efforts at shadow reporting and bottom-up accountability somewhat fruitless in terms of changing government reporting and consultation practices around the SDGs. As one interviewee noted, 'The targets of our advocacy have to include human rights mechanisms, but also those with real power, like IFIs'. Yet these power-holders 'only listen to others with commensurate power'. They'll 'ignore your message if they've nothing to lose by doing so'. The issue is 'how do we get the human rights message to bite?'.

The serious shortcomings in all these arenas raises challenging questions about how we can most effectively ‘build up the “supply side” of accountability, as one interviewee put it. From the interviews, an aspect of this work that is particularly valued by partners and allies is the skills and capacity-building dimension of our collaborative efforts to engage mechanisms in order to strengthen international norms and elaborate obligations related to different policy areas more concretely. For example, the CESR-led initiative to develop a new set of principles on fiscal policy and human rights was seen as having significant value in equipping activists across different disciplines to engage with the human rights framework in an operational manner. This illustrates the relationship of this work to our role in amplifying collective power.

Amplifying collective power

Many of the interviewees agreed that it’s imperative to work collaboratively. The role CESR is playing ‘strengthening those whose work is movement building is incredibly important’ for achieving long term change. But we need a strong, clear rationale as to ‘why the extra effort is worth it’. As one interviewee explained, if an NGO is structured in a way that’s responsive to advocacy “wins”, that ‘really conditions what you’re able to offer to wider activist struggles’ because it ‘doesn’t give you the time to be truly respectful of the processes that groups on the ground need to follow to if the action is really to be held as theirs’. Contributing to wider empowering processes, fostering broader alliances, and helping groups transcend silos are outcomes that should be appreciated and intended.

The types of field building work we’re known for includes:

- *Knowledge production*—CESR acts ‘almost like a think tank’ or as a ‘brain trust’, building the ‘body of knowledge’ and developing the ‘language that others pick up’, as interviewees put it. ‘You’re a connector between the way that communities are articulating their justice visions and what’s a priority and these big institutionalized conversations (on the SDGs, tax etc.); you’ve been able to really enunciate a human rights “position” and inject that into key discussions in key moments’.
- *Bridging silos*—supporting diagnosis of root causes and common dynamics that underlie deprivations, which ‘knits together’ different issue-based or rights-based work taking place in different spaces. ‘The fact that you work with a lot of people outside the human rights field is a strength—they can give you feedback on relevance of rights’, noted one interviewee.
- *Skills-building*—CESR has expanded the ‘tactical repertoire’ for human rights research and advocacy by developing methodological tools. ‘The capacity building role you play is really crucial and recognized and appreciated; that will be important going forward’, noted one interviewee. OPERA is ‘such an important tool’ and ‘your methodology is really good, I have to say, I really like it’, stressed others. Suggestions for reaching a wider audience with these tools include developing online and in-person learning opportunities; producing less “intellectual” and more accessible materials; demystifying “technical jargon”; and using more case studies, both as a learning tool and as a means of countering political misinformation with concrete evidence.

One interviewee saw ‘a lot more room’ in the skillsets we can bring and encouraged us to seek out ‘opportunities for creativity and experimentation’. Another stressed the need to ‘take cues from the people in a position to effectively leverage’ us. This means not looking at need in the abstract, but mapping the terrain, seeing who’s doing really good work, identifying what we can bring to put them in a stronger position to be effective (e.g. in terms of additional insights, clarity, tools, resources, partners etc.).

That said, a number counselled against branding ourselves as “skills-builders” in the abstract without profiling a particular area of expertise that we are sharing—e.g. is it capacity on specific thematic areas, particular countries, different functions? This will influence who we aim to be accessible to. The “capacity-building northern INGO” is heavy with neo-colonial connotations. Skills-sharing, one interviewee

remarked, is best done through concrete collaboration with a partner on an issue that is of concern to them. ‘Rather than training, it’s about doing things together; you learn much more through a collaborative research and advocacy project than a workshop’. One funder remarked that presenting CESR as a skills-builder and amplifier of the concerns of others in the field “conveys a certain hubris” and was likely to have less traction with funders than emphasizing its role in advancing its own issues on the agenda. Again, seeing mutual skills-building as a shared endeavor is key. ‘You provide instruments and tools that help other activists do their work better, but what’s crucial is that they’re developed jointly, and in the specific contexts where they’re needed, not remotely in NYC’, highlighted one interviewee.

Suggestions made for types of field building work CESR could ‘lean into’ more included:

- *Fiscal and economic literacy*—there’s a big appetite for this because it empowers activists to “call out the bullshit”, which builds confidence in a movement, one interviewee noted. Most people have no idea about how the tax burden is spread across society stressed another. This echoes an earlier consultation on our methodological work. But to do this work, you need to know economics and you also need to know how to do popular education, one interviewee flagged; often economists can’t talk in a way that makes sense for activists.
- *Narrative as a form of rights claiming*—stories are what connects the normative content of human rights to people’s lived experience of inequality; there may be creative ways to work with campaigners to communicate how human rights supports community building, helps push back against populism etc. That said, it’s possible to lose focus on the research and analysis that supports narratives noted one interviewee, adding ‘that’s a role you’ve always played, and I hope you’ll continue to play’. Another also saw this is a promising area for CESR. ‘An organization with your power of analysis can provide other actors with the technical arguments and evidence that can help to change dominant mainstream narratives; unpacking myths, exposing them and providing tools to help them shift the narrative can be very empowering’.
- *Configurations for successful collaboration*—the ‘how’ of social justice is as important as the ‘what’. Encouraging creativity and innovation is important, noted one interviewee, because ‘it’s easy for organizations to get stuck in the same way of doing things’. We could think about having internal laboratory of testing and experimenting or about co-designing collaborative research and advocacy projects with partners on emblematic issues which enable mutual skills-sharing.
- *Feminist understanding of power*—which could strengthen the political economy dimension of socioeconomic rights analysis.

Another theme raised in the interviews was how we might broaden the impact of our field building work by creating a stronger “ripple effect” or “demonstration effect”. As one interviewee commented, our partnerships with national groups are vertical; we could think more about how to spread ideas horizontally, as well. ‘You’re good at sharing, but could still improve’, said another. The knowledge we exchange with partner organizations at the national level is ‘fantastic’, noted another. But what’s missing is the time to collect and systematize their knowledge and their good practice. Another commented that often ‘researchers don’t know what’s out there that they can draw on’. Another described the need to spread ‘belief in the possibility of overcoming systemic challenges’.

This would have implications for how we approach our work with national groups, which groups we work with, as well as how we profile our work with them. Suggestions included:

- Think more strategically about where we invest energy building connections with national partners, which are resource intensive and depend on a number of factors converging to succeed.
- Make it a priority to work with groups/communities closest to the injustices we seek to tackle, because ‘real shifts come from enabling people directly affected, those who have no choice but to resist because their livelihood is at stake’.

- Think about what we want to be able to demonstrate from these partnerships—e.g. it could be showing similar phenomena in similar contexts or different ways of doing things in different contexts—that way we’ve gained something (perspectives, ideas, tools etc.) that we can replicate or amplify with others.
- Broaden our geographic scope—e.g. on fiscal policy, we’re currently focused heavily in Latin America, for example, while our SDG monitoring is largely limited to the MENA region.
- If our mindset is ‘we’re part of a global movement’, then ask ‘what global resources does the movement need and how can we raise awareness about them?’ This can help to profile our work in a way that makes sense to national groups and helps them engage with it better.
- Make resources available ‘to meet different groups where they’re at’, while also recognizing that their uptake may depend on deeper and more tailored engagement.
- Work on themes ‘that are locally relevant but globally significant’, focusing on countries ‘where the effects of global economic inequalities are felt the most’.
- Continue to share experiences of this work with others—including failures as well as successes—which would provide helpful feedback.
- Resist feeling that you need to construct something, instead identify where you want to focus your attention (e.g. specific areas of policy analysis or major debates) and then see where it grows organically.
- Telling the story of how it has worked to bring people together, develop the analysis, and construct the narrative is also really important learning for the movement; it enacts what you’re doing, amplifies it, and then gives you space to talk about it, analyze it and advance it.

However, as one interviewee flagged, we need to be clear how we’re defining movements and support for movement building—e.g. are we focusing on clearly identifiable movements on a particular issue or in a particular place or more fluid and nimble movements that might come together around a particular issue? Again, the answer has implications for how we would structure our work and how we would brand ourselves to potential partners and funders.

Strengthening organizational capacities

The strategy design process is also an opportunity to pursue the organizational strengthening agenda for which we have laid foundations this year. This has several different components.

In the next cycle, we aim to strengthen the structures and processes we have in place for project management. This includes developing a lean and agile monitoring and evaluation system that enables us to gather the evidence we need to reflect on, and communicate about, our effectiveness, as well as strengthening performance management and professional development systems. The stocktaking exercise and reflections on it revealed that while we have developed a number of tools for designing and implementing projects, they are not implemented consistently and there are some areas where we have gaps. We are already refining the tools we use to conceptualize and prioritize projects and will pilot ways to socialize and integrate these tools into our work.

A number of interviewees stressed the importance of strengthening our communication. Responding to the trends outlined above, particularly the need to break down silos and mobilize across movements, a number of communications priorities emerged in the Phase One conversations, including:

- How can we better communicate the concrete value add of the human rights framework in addressing people’s grievances against inequality?
- How can we strengthen our branding, e.g. is there a way to name the “thing” we do and articulate it a little more?

- How do we better visibilize why the work we support others to do is so unique and how it fits into our change agenda?
- How can we breakthrough in communicating our work to a much larger audience and position ourselves as influencers in our areas of work?

Ideas for advancing on these priorities emerging from our internal brainstorming include: getting clarity on who our primary audiences are; showcasing our partners and incorporating other peoples' voices (but being careful not to be extractive); producing shorter more accessible outputs that can be communicated immediately; reconsidering the balance of outputs (e.g. more directed to community activists); and thinking about how we can lend our support to/ express solidarity with/ amplify the work of social movements. Nevertheless, capacity is a challenge and often the production of outputs are often 'down to the wire'. Exploring strategies to boost capacity in this area is a priority.

Another component is to ensure our future organizational structure corresponds to the revised strategy and includes the necessary functions and competencies needed, whether programmatic or operational. Changes have already been made to enhance our fundraising, financial administration and operations functions. The ongoing strategy design process will likely entail further changes including creating a more unified and integrated program structure, and boosting our staffing capacity for fundraising and new areas of program.

Team cohesion and commitment is a core organizational strength. But our size is a challenge. We need to implement strategies for growing an increasingly diverse global team, including in geographic and disciplinary terms. Framing our work around the problem of resource distribution does have particular capacity implications to address. As one interviewee noted, if we're going to work on economic justice, we have to go beyond fiscal policy. This means working with 'a really good progressive economist' so that we have the capacity to do structural analysis in a really good way. More broadly, diversifying the staff team so as to deepen its connections to the communities we ultimately serve is crucial. 'If possible, have different staff immersed in groups working at the grassroots giving time to learn from them', suggested one interviewee. Adding, 'internal diversity also matters—it sends a message about how committed you are'.

CONCLUSION

As one interviewee noted, 'CESR is doomed to be overstretched', given it's one of the very few organizations focused on socioeconomic rights; the 'urgency of the big issues' that will come up and the 'imperative to react' will always be there. Nevertheless, this phase of the strategy design process has generated invaluable insights that can help us determine where to prioritize our energy and resources over the course of the next three years.

This document offers a tremendous amount of "food for thought", which we will digest through further internal deliberation and external consultation. This, in turn, will guide us in revising our mission and vision; finalizing our theory of change; designing specific objectives for our programmatic and organizational strategies; and articulating the intervention pathways for achieving them.

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