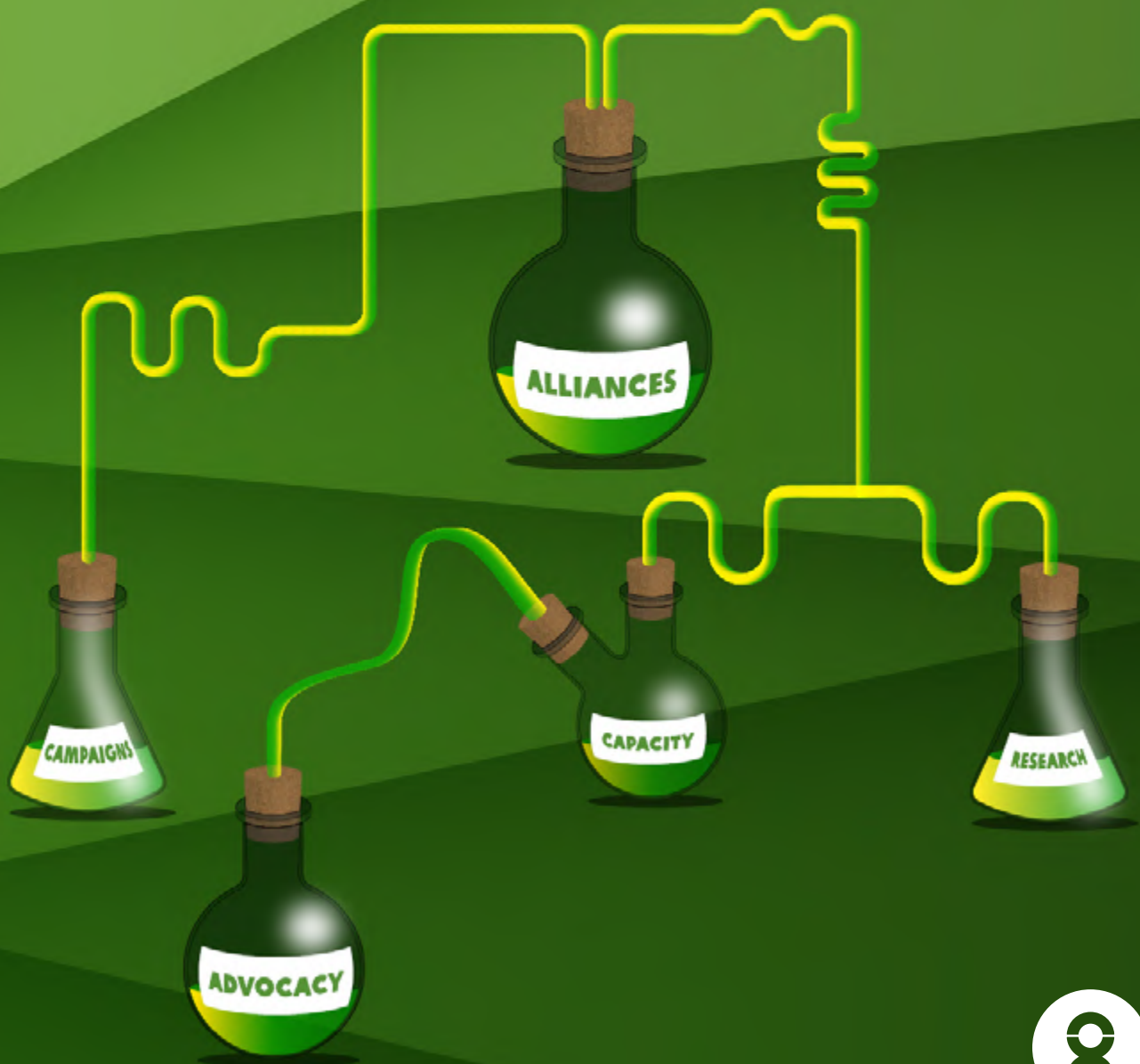


# GINI IN A BOTTLE

Distilling learnings from implementing countries



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# 0 INTRODUCTION

An agile systematization process (interviews with country teams and a few partners) was undertaken in nine countries (Australia, Colombia, Denmark, El Salvador, Kenya, Netherlands, Spain, Tunisia, and Vietnam) where the GINI program and other inequality reduction initiatives were implemented. The aim was to draw out key lessons learned based on their experiences of the five-step approach by not only finding common threads but also identifying unique experiences that shed light on specific challenges and opportunities that future GINI country teams may encounter. This is an internal document that feeds into other GINI documents to offer guidance, inspiration and examples for countries working on inequality reduction.

Apart from the insights described under each specific section, overall findings point to the relevance of radical ownership of the approach, adapting and even changing some of the basic principles of the five-step approach, in order to find the right combination or sequence that fits each context, different capacities and various ambitions. The emerging challenges of shrinking civic space across regions are another issue to be noted, alongside the exceptional capacity of teams to find solutions and alternatives to navigate the difficulties.



# 1 BUILDING ALLIANCES

Alliances are central to advancing GINI objectives: they increase legitimacy, broaden reach, diversify capacities (research, communications, mobilization), and help manage risk – especially in contexts with shrinking civic space.

Oxfam’s added value is often related to some of these features

1. **Multilevel connections** (local > national > regional).
2. **Convening and coordination capacity.**
3. **Technical expertise** in research, advocacy, campaigning.
4. **Financing** and donor access.
5. **Brand credibility** and willingness to co-create.

## WHO TO INCLUDE

- Local CSOs and grassroots movements (legitimacy, mobilization)
- Media/communications specialists (message design, outreach)
- Mobilizing actors (translate technical issues into public narratives)
- Think tanks, academia, unions, philanthropy, social services, small campaigning groups, private sector (context-dependent)

## RED FLAGS – ACTORS TO BE CAUTIOUS ABOUT

- Highly partisan organizations that may polarize the alliance
- Actors with disproportionate agenda control (risking domination)
- Organizations that are heavily dependent on public funds or services (conflict of interest)



## Alliance models and trade-offs

<b>Scope</b>	<ul style="list-style-type: none"> <li>• <b>Broad inequality frame:</b> stronger national reach, diverse voices, harder to agree on common demands.</li> <li>• <b>Issue focused:</b> clearer advocacy asks, easier coordination, potentially narrower reach.</li> <li>• <b>Mixed:</b> thematic nodes under a broad umbrella (used effectively in Spain).</li> </ul>
<b>Size</b>	<ul style="list-style-type: none"> <li>• <b>Large/wide:</b> more legitimacy and mobilization but higher coordination costs and internal divergence.</li> <li>• <b>Small/focused:</b> easier alignment and faster decision making; may need linking to grassroots for mobilization.</li> </ul>
<b>Create vs. tap into existing</b>	<ul style="list-style-type: none"> <li>• <b>Tap existing:</b> faster, less resource intensive, requires careful decolonial engagement to avoid takeover.</li> <li>• <b>Create new:</b> fills gaps, tailored design, but needs trust building and time. Hybrid approaches (new alliance linked to existing networks) can work well.</li> </ul>
<b>Project design</b>	<ul style="list-style-type: none"> <li>• <b>Predefined project:</b> attracts partners wanting clarity and commitment.</li> <li>• <b>Co-created project:</b> fosters ownership but may deter resource constrained partners until ideas crystallize.</li> <li>• <b>Best practice:</b> have a clear idea but remain open to partner input.</li> </ul>

### How to build an alliance (practical steps)

1. Map potential actors (desk + local validation).
2. Hold initial one to one conversations to understand priorities and added value.
3. Run joint activities (workshops, shared research, pilot events) to build trust.
4. Formalize through simple governance (roles, decision rules, rotating/participatory leadership).
5. Adapt structure over time (e.g., create thematic working groups if the alliance grows or faces polarization).

### Attitudes and practices that facilitate partnership

1. **Humility and mutual respect:** avoid portraying partners as having deficits.
2. **Power awareness:** mitigate Oxfam’s dominance (flexible branding, delegated roles).
3. **Transparency** about Oxfam’s interests and contributions
4. **Co-creation:** involve partners early in design, funding, and decision making.

## Common challenges and solutions

<i>Tensions from ideological diversity</i>	Find common values; reduce/divide decision-making into thematic groups; delegate roles
<i>Risk of Oxfam taking over</i>	Share leadership; offer unbranded options; clarify governance
<i>Funding imbalances</i>	Shared resources for joint activities; align ambition to resources; co-apply for funds
<i>Shrinking civic space</i>	Reduce public visibility when needed; anchor research locally; support partners with flexible funding and security measures
<i>Failure to mobilize public</i>	Strengthen links with mobilizing actors; focus campaign asks on concrete, relatable benefits; use communications partners

## Key takeaways

1. Choose alliance type based on objectives and civic context.
2. Prioritize equity, transparency and shared ownership to maintain trust and decolonial practice.
3. Use flexible structures (thematic working groups, delegated roles) to manage diversity and risk.
4. Leverage Oxfam's technical, convening and financing strengths – but avoid dominating the agenda.



## 2 CAPACITY EXCHANGE

Capacity exchange strengthens partners and communities to understand, act on, and sustain economic inequality work – while respecting local agency and decolonial principles.

### Objectives

1. Build technical understanding of inequality-related topics.
2. Strengthen partners' advocacy, research and campaigning skills.
3. Promote sustainability and autonomy so partners can continue work beyond the program.
4. Equip citizens with tools to engage with duty bearers and public debates.

### Common topics

1. General economic inequality concepts
2. Taxation/fiscal justice
3. Public budgeting and spending processes
4. Feminist economics and care policies
5. Advocacy and communications
6. Fundraising and grant management
7. Network building and cooperation
8. Participatory knowledge creation

### Measuring success (focus on outcomes)

1. Track application of learning (e.g., partners using new analysis in advocacy; citizens raising demands).
2. Monitor narrative/agenda shifts within partner organizations.
3. Go beyond outputs (attendance/materials) to evidence of behavioral or policy use of skills.

### MODALITIES AND FORMATS

- In person schools and workshops (deeper trust and networking)
- Online courses and toolkits (cost efficient, scalable)
- Hybrid approaches (combine depth and reach)
- Tailored curricula (fixed frameworks can be adapted during delivery)
- Participatory formats (co creation, action research) where feasible

### WHO TO TARGET

- Movement members and organized civil society (higher sustainability)
- Grassroots leaders (for local legitimacy and mobilization)
- Student groups and investigative media (youth engagement and visibility)
- Nontechnical CSOs that can mainstream fiscal issues into their agendas

## What works?

### PRACTICAL GOOD PRACTICES

- Frame training with *humility* – avoid deficit framing of partners' capacities.
- Use flexible funding and simple follow up mechanisms to support uptake.
- Combine technical training with communications and mobilization skills.
- Where contact is difficult long term, include peer networks or alumni groups to sustain learning.
- Prefer context adapted curricula; start with clear orientation but allow iterative reshaping.

### ENSURING RELEVANCE AND PARTICIPATION

- Start with a participatory needs assessment: ask partners what they need and tailor content accordingly.
- Co-design syllabi with partners, when possible, while retaining a clear orientation.
- Use local examples and mix quantitative and qualitative materials to connect policy with lived experience.



## 3 RESEARCH

Research provides credible evidence and narratives to inform advocacy, campaigns, capacity-building and alliance work. It must be accessible, context relevant and used to change both policy debates and public narratives.

### Key principles

1. **Complementarity:** *Quantitative* measures magnitude; *qualitative* explains causes, meanings and lived experience. Use both where possible.
2. **Context first:** Tailor methods and products to the political context and the audiences you want to influence (government, media, public, partners).
3. **Co-production and decolonial practice:** Involve local researchers and affected communities in design, data collection and dissemination to boost legitimacy and ownership.
4. **Translate, don't just publish:** Turn technical reports into short, compelling, locally anchored products for advocacy and campaigns.

### Do we need to produce new data?

Not always. Other options include:

1. Use existing government/academic data and add qualitative layers.
2. Support local researchers to produce credible, context legitimate work.
3. Repackage existing evidence into advocacy friendly formats (infographics, briefs, stories).

Complementarity rather than opposition: quantitative research primarily describes, while qualitative research seeks to understand the causes and social meanings of social practices themselves.

Quantitative research does not seek to understand "mechanisms" (interactions) but rather describes situations, frequencies, magnitudes, discourses and elements. It is key to "measuring" a phenomenon, but then requires qualitative analysis to understand the mechanisms, interactions, behaviors and social meaning that social actors give to their practices.

Qualitative research not only connects with reality, but also offers a series of empirical evidence to:

- Understand the processes of subjectivation and social significance of inequalities for the social actors themselves (Why do they do what they do? How do they do it? What meaning do inequalities have for them? How do they affect them? Etc.).
- Provide a better understanding of social practices, interactions, conflicts, etc.
- Identify contradictions and ambivalences in discourse and social practice.
- Understand the meaning that social actors give to their own practices.

Qualitative research also produces empirical data, but of a different nature than quantitative data.

The decision regarding which methods to use isn't just determined by the advantages or disadvantages, because the national context can also have an impact.

## How to make research useful for influence

1. Determine the primary objective and audience early.
2. Design products for different uses: technical briefs for policymakers; short briefs, media pieces and human stories for public engagement.
3. Work with communications specialists or media partners to popularize findings.
4. Break long reports into focused pieces over time to sustain attention.
5. Share and adapt global research (e.g., Davos products) into national hooks rather than assuming global outputs translate directly.

## Including community voices

1. Include communities where relevant, especially in participatory or local impact studies.
2. Use participatory action research when feasible to build ownership and advocacy capacity.
3. Be realistic: highly technical national fiscal reports may not always allow deep community participation – use targeted approaches to link tax analysis to local impacts.

## Practical recommendations

1. Map target audiences and choose methods they trust.
2. Co design research with partners; fund and build local capacities when possible.
3. Translate outputs into multiple formats for different users.
4. Monitor risks when working in restricted civic spaces – prefer locally produced research and reduce visibility if needed.
5. Plan uptake from the start: link research timelines to advocacy windows and campaign plans.



## 4 ADVOCACY

Use strategic, evidence based influence to place economic inequality on decision makers' and the public's agenda – adapting tactics to context and civic space risks.

### Core principles

1. **Be strategic and flexible:** Combine clear objectives with adaptable tactics to seize windows of opportunity.
2. **Know the targets:** Map government actors, entry points, and internal divisions to find influence “cracks.”
3. **Work with allies:** Advocacy is stronger and safer when done in coalition, sharing risks and legitimacy.
4. **Protect partners:** In restrictive or polarized contexts, adapt visibility, branding and tactics to reduce harm.
5. **Be propositional:** Offer concrete, realistic policy solutions, not only critiques.

### When to go solo versus a coalition

1. Prefer **coalitions** for legitimacy, broader reach, and risk sharing.
2. Consider **unbranded** or lower profile approaches if partner safety or political backlash is a risk.
3. Use **direct affiliate advocacy** if local partners would be endangered by visible international involvement.

### Tactics and channels

1. **Policy entry points:** ministries, parliament, treasury, local governments, anti poverty bodies.
2. **Public engagement:** campaigns, media, festivals, creator/content partnerships, grassroots mobilization.
3. **Technical routes:** policy briefs, evidence co-production, “critical friend” advisory roles with government.
4. **Adaptive tactics:** shift between public campaigns and private dialogue depending on risk and timing.

### Adapting to shrinking civic space

1. Prioritize locally anchored research and ally capacity exchange.
2. Use quieter, technical or dialogue based influence when public advocacy is unsafe.
3. Support partners to do their own advocacy where international visibility is harmful.
4. Restructure broad alliances into smaller thematic groups to reduce exposure and maintain momentum.

## Connecting with the public

1. Identify a clear target audience and tailor messages to their priorities (e.g., cost of living, services).
2. Link fiscal/tax arguments to tangible local benefits (schools, health, care services).
3. Combine numbers with human stories to build empathy and understanding.
4. Test messages and work with media/communications specialists or partners experienced in campaigning.
5. Combine digital reach with mobilizing actors (unions, grassroots) for real world pressure.

## Common advocacy challenges and pragmatic solutions

1. Closed civic space > use technical channels, local partners, unbranded outputs.
2. Disengaged public > offer concrete solutions and connect to everyday concerns.
3. Polarization and partisan pressure > avoid partisan positioning; maintain broad, democratic alliances.
4. Resource/expertise gaps > share strengths across partners; focus ambition on available resources.
5. Partner safety concerns > reduce visibility, decentralize leadership and monitor risks continuously.



# 5 CAMPAIGNS

Campaigns translate research, alliances and advocacy into public pressure and narrative change to make economic inequality politically salient and actionable.

## Core points

1. **Aim:** Inform, mobilize and pressure – linking inequality to people’s everyday concerns and offering concrete solutions.
2. **Alliances:** Prefer campaigning with partners for legitimacy, reach and risk sharing. Use unbranded or partner led tactics where international visibility is harmful.
3. **Context sensitivity:** Tailor ambition and tactics to civic space openness, resources and political timing.

## Which campaign approach to choose

1. **Mass public campaign:** When civic space is open and mobilizers (unions, movements) exist. Focus on clear, relatable asks.
2. **Targeted/niche campaign:** When resources are limited or issue is technical (tax, budget). Target influencers, policymakers, specific demographics.
3. **Low visibility/cultural outreach:** In restricted spaces, use festivals, arts, creators or discreet community work to reach audiences safely.
4. **Supportive role:** Provide comms, research, or funding to movements leading public action (Oxfam as enabler).

## How to connect with the public

1. **Define a narrow target** (e.g., young urban voters, parents worried about costs).
2. **Anchor demands in lived reality:** Show direct benefits (schools, care, lower living costs).
3. **Be solution oriented:** Offer concrete, simple policy asks – not just problem framing.

4. **Mix formats:** short briefs, infographics, human stories, videos, social posts. Break long reports into shareable pieces.
5. **Combine digital reach with real mobilizers** (trade unions, grassroots) for offline pressure.

## Tactics that work (examples)

1. Social media campaigns with tested messages (Colombia).
2. Communication partnerships and media specialists to popularize technical research (Australia, Colombia).
3. Cultural events and creator grants to scale reach under restrictive regimes (Vietnam).
4. Phased product releases to keep attention over time.

## Risks and mitigations

1. **Shrinking civic space/backlash:** Use unbranded outputs, local lead, quieter tactics, decentralize visibility.
2. **Low public interest in technical issues:** Translate into local impacts and human stories; test messages before scale.
3. **Resource limits:** Narrow the target, prioritize high impact channels, partner for shared capacity.
4. **Overreach/inconsistent alliance claims:** Develop flexible asks so partners can adapt them.

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