



# Professional Training Course on Inequality in Southern Africa

Johannesburg | 25–29 November 2019

## FINAL REPORT



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## 1. Introduction

Despite great success in reducing poverty, income and wealth inequalities within states have risen severely in recent years. Inequality is a threat to social cohesion and economic growth. Therefore, the 2030 Agenda for Sustainable Development addresses the reduction of inequality both as a stand-alone target (SDG 10) and as a crosscutting issue with references to 12 other SDGs.

Against this background, the Professional Training Course on Inequality brought together an influential group of 15 policy makers and practitioners from different partner countries, who share a commitment to reducing inequalities.

Together with the lecturers, the participants assessed inequalities and put it in broader global contexts. Based on these discussions, effective current policy directions and additional solutions were tabled, discussed and honed. The course further enhanced cross-sectoral and cross-country support and practical approaches for reducing inequalities.



## **2. General**

The special designed Training Course on Inequality has been organised by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ) in collaboration with the Maastricht Graduate School of Governance (Maastricht University) and the United Nations University – Maastricht Economic and Social Research Institute on Innovation and Technology (UNU-MERIT).

The course took place from 25<sup>th</sup> to 29<sup>th</sup> November 2019 in Johannesburg, South Africa.

The training combined traditional lectures, knowledge-sharing sessions and open discussions amongst participants. Moreover, the training course provided participants with best practice examples of policy measures that can contribute to reducing inequality within countries. Inequality was analysed in its multiple dimensions such as economic, cultural, political, ethnic dimension.

### **3. Outcomes in a nutshell**

#### **The Professional Training Course on Inequality**

- offered a multidisciplinary training program bringing politics, academia and practitioners together;
- contributed on capacity building by providing participants with a broad knowledge on all types of inequality and an understanding of the development of inequality, drivers and policy;
- provided a unique focus on specific issues related to inequality and critical insights into the most recent evidence about inequality;
- created a forum for discussion country-specific contexts and reforms;
- helped developing an understanding of the policy challenges i.e. design and implementation of policies;
- supported participants in overcoming difficulties in dealing with practical issues from their daily relevant work in their home countries and helped gaining skills to improve policies to promote equality.

## 4. The programme

	Monday, 25 <sup>th</sup>	Tuesday, 26 <sup>th</sup>	Wednesday, 27 <sup>th</sup>	Thursday, 28 <sup>th</sup>	Friday, 29 <sup>th</sup>
	Building Knowledge Base <sup>a</sup>	Designing and Implementing Policies for Combating Inequality			Next Steps
	Arrival and Coffee				
09:30	Introduction Concepts, Measures, Types of Inequality	International Development Cooperation <b>Martin Weiss</b>	Social Protection and Inequality <b>Selwyn Jehoma</b>	Taxation <b>Belinda Archibong</b>	Nigeria <b>Belinda Archibong</b>
11:00	Coffee Break				
11:30	Trends of Inequality in SSA <b>Samuel Kofi Tetteh-Baah</b>	Drivers of Inequality <b>Murray Leibbrandt</b>	Knowledge-Sharing Session	Working Groups on Selected Topics	Feedback / Next Steps
12:30	Lunch Break				Closing and Lunch
13:30	State of Inequality and Challenges <b>Discussion by participants</b>	Industrial Policies and Trade Policies <b>Fiona Tregenna</b>	Labour Market Policies <b>Murray Leibbrandt</b>	Financial Inclusion <b>Lwanga Elisabeth Nanziri</b>	
15:00	Coffee Break				
15:30	Knowledge-Sharing Session	Ethiopia <b>Mesele Araya</b>	South Africa <b>Edward Webster</b>	Policy Mix or Cross-Sectoral Approach <b>Ayodele Odusola</b>	
		Knowledge-Sharing Session	Knowledge-Sharing Session		
17:30	Wrap-up				
	Dinner	Dinner	Dinner	Farewell Dinner	

## **5. The lectures**

The lectures included both theoretical elements and practical training through case studies. The lectures were organised around three themes:

1. Building a knowledge base on inequality
2. Lessons from best practises
3. Designing and implementing policies for combating inequality and next steps

During the training, participants were actively involved in the lectures by participating in group activities and working on the case studies and mock cases prepared by the trainers.

## 1. Building a knowledge base on inequality

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### *Lecture 1: Concepts, Measures, and Types of Inequality | Bernd Lakemeier*

This session provided the necessary background, facts, figures and trends as well as a narrative on inequality. The objective of the session was to contribute to a global understanding on inequalities on a multidimensional level by presenting the latest data and to equip participants to make informed decisions. Economic inequality is widespread. In this regard, the lecture highlighted the fact that no single scientific truth exists about the ideal level of inequality, let alone the most socially desirable mix of policies and institutions to achieve this level. Moreover, there is no “one size fits all” to reduce inequalities. It is important to focus on the country specific factors and drivers of inequality to reduce it.





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***Lecture 2: Trends of Inequality in SSA / Samuel Kofi Tetteh-Baah***

The lecture highlighted the influence of different factors, like location, gender, race or religion on vertical inequality specifically, as well as the differences to other drivers for various forms of inequality. The focus of the session was additionally on the importance of focusing on inequality especially on the African continent and the rising income inequality within countries and the falling income inequality between countries. Especially in sub-Saharan Africa, where inequality rates are overall high, the rising inequalities have an influence on trust, social and political stability, democracy, economic growth and poverty reduction.



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***Lecture 3: State of Inequality and Challenges / Discussion led by participants***

The aim of this session was to give participants a space to explain their respective countries situation and context in the light of inequality and measures taken to reduce it. Specifically, a focus on poverty rather than inequality as a response to rising inequality was discussed.



## 2. Lessons from best practices

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### *Lecture 4: International Development Cooperation / Martin Weiss*

The lecture gave an overview about the work of development cooperation in the southern African region, its advantages and limitations specifically in the context of South Africa. South Africa's GIZ country director explained how cooperation and focus areas are agreed on and shed some light on the way they are implemented. The session gave participants a space to ask questions and talk in a very interactive setting about their opinion on development cooperation. Participants vividly exchanged ideas and referred to their relevant work.



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### *Lecture 5: Drivers of Inequality | Murray Leibbrandt*

This interactive session focussed on various dimensions of inequality such as wealth and income, inequality of opportunities as well as between men and women and in various sectors like education, health and other services. The lecture highlighted commonalities as well as differences in the dimensions of various forms of inequality. The focus of the session was on structural drivers and consequences of inequality as well as indicating policy options to counter inequality.

Concrete examples of South Africa and its histories legacy of structural inequality were used to explain the dimensions more in depth. By focussing on spatial inequality, land and housing issues and racial and ethnic relations in the context of South Africa, differences and similarities to the participant's countries could be outlined and discussed. The focus was less on the economic effects, i.e. whether and how inequality influences GDP growth, and more on the need to correlate the different dimensions to understand inequality for policy makers and civil societies to act against the rising inequality.



### 3. Designing and implementing policies for combating inequality

#### *Lecture 6: Industrial Policies and Trade Policies | Fiona Tregenna*

This lecture started with a brief history of industrial policy and looked at one of the key concerns in classical development economics; structural change. The following discussion focused on two major themes: First, the importance of industrialisation and the reality of deindustrialisation and its influence on growth as well as its change and the dependence on the nature of the structural change. Examples of the respective countries were given. Second, trade and trade policy and its effects on inequality between and within countries. In the new era of knowledge-based economy, industrial policies have put more and more attention on technology upgrading. It was then further discussed how new industrialized countries have adjusted their industrial policies at different development stages, e.g. how some of these countries shifted from resource and labour intensive manufacturing to innovative industries. Finally, the group debated possible links between industrial policy and reducing inequality, with a special focus on groups, which benefit and lose the most from open trade.



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*Lecture 7: Examples and case studies from Ethiopia | Mesele Araya*



To understand inequality in its complexity several case studies were covered in lectures to brighten the understanding of dimensions of inequality within specific country contexts. The first case study session covered Ethiopia as an example as it offers a good deterrent of fast growth, rapid poverty reduction and relatively stable inequality. This is partly due to the implementation of a series of economic plans since 2001. This led to an evidence of economic growth, which is higher than the growth rates in most African countries. This is partly due to a progress in health outcomes and access to education accompanied with improved access to infrastructure and portable water. Yet, inequality on a national level appeared to increase over time. There is still relatively small shift of economic gains from higher to lower income households. Despite the rapid declines in poverty reduction, the inequality level is rising, especially in urban areas. This provided a good understanding led to comparison between the situations in the respective countries.

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***Lecture 8: Social Protection and Inequality / Selwyn Jehoma***

For decades, spending on social protection has been considered a cost rather than a productive investment in low- and middle-income countries. This view has changed, though, given the impressive evidence on the benefits of social protection. Precise interventions to guarantee social protection, i.e. social security by providing social insurance, assistance, labour market interventions, social justice and public works and livelihood initiatives, enable governments to manifest these. The ILO has shown that almost all countries can afford social protection policies. During this lecture, the group went through theories linking social protection with inclusive development and growth and derived a brief history of social protection, highlighting the development on the African continent and the multi-dimensional impacts of social protection. Examples of the represented countries social protection programme were compared and discussed more in depth at the end of the session.



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***Lecture 9: Labour Market Policies / Murray Leibbrandt***

Wage and earning gaps typically account for a large share of overall socioeconomic inequality and employment plays an important role in the reduction of poverty and the productivity growth. Understanding the importance of labour market policies and the influence and the disparities in labour market outcomes is necessary for a complete appreciation of the drivers of inequality. The group first explored specific labour market policies, i.e. job search assistance, wage and employment subsidies, vocational training and public work programs as well as unemployment insurance. This allowed participants to familiarise with the potential obstacles to full employment and decent work. The group also learned more about aspects of minimum wage, and the importance to ensure equal opportunities for all.





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*Lecture 10: Examples and case studies from South Africa | Edward Webster*



To understand inequality in its complexity several case studies were covered in lectures to brighten the understanding of dimensions of inequality within specific country contexts. The second case study session covered South Africa as an example, as it offers a good deterrent of a progressive tax system and progressive constitutions, yet is the most unequal country in the world. This session focussed on a necessary shift towards a southern approach to inequality, one underlying reason for this is the often falsely assumed universalism of the origins and solutions to inequality. Yet, addressing inequality from a country specific context is utterly important. Specifically, in South Africa, inequality in post-apartheid and its different dimensions must be taken into account. South Africa had a long history of studying poverty, while the focus on inequality has just recently entered the academic and policy discourse, which was broadly highlighted in the session.

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*Lecture 11: Taxation / Belinda Archibong*

The lecture focused on taxation and its effectiveness to influence inequality in developing countries. In the first part, participants discussed the opposite views that have dominated the debate around this topic. The pro and contra sides of the central question about government use of taxation to reduce inequality, the objectives of taxation from governments were explained. Focussing on economic efficiency, the ability to pay principle, the horizontal equity principle the benefits received principle and the goal of attaining social objectives the issues of meeting these objectives have been explained. Initially, taxation was thought to be negative for economic growth and ineffective in influencing income distribution; now, it is considered as a powerful policy tool to promote a more equal society. The session highlighted how progressive direct taxes and transfers can help reduce income inequality through many channels. After discussing the pro and contra sides of the central question about



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*Lecture 12: Financial Inclusion / Lwanga Elisabeth Nanziri*

Financial inclusion goes beyond improved access to credit to encompass enhanced access to savings and risk mitigation products, to a well-functioning financial infrastructure that allows individuals and companies to engage actively in the economy, while protecting users' rights. The session highlighted the different ways of delivering financial services at an affordable cost to vast sections of disadvantaged and low-income groups, which are historically excluded from formal financial sector. There circle around remittances, saving, credit and insurance. The different dimensions of Financial Inclusions, access, usage and quality ensured a broader understanding of the topic. Furthermore, wage earning and saving patterns were explored and problems connected were explored, including personal experience of the group. Finally, different case studies, i.e. Kenya, South Africa Zambia and Ethiopia, and their financial inclusion strategies helped to gain a further baseline of the topic.



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***Lecture 13: Policy Mix or cross-sectoral approach / Ayodele Odusola***

A divergence in income levels and trends across regions, groups and countries exist explicitly in Southern African countries, which exhibit high-income inequality. Drivers and reasons of income inequality are multi-dimensional and complex. Inequality in itself generates a development paradox, which make development management more complex. Extreme inequality is detrimental to growth and development, countries in the same region face similar problems, yet there is no one silver bullet to addressing inequality on the African continent and policies addressing the reduction of poverty are not necessarily the same as those that help reduce income inequality.

The lesson summarized the magnitude and trends of income inequality in sub-Saharan Africa and pointed out structural drivers of inequality. Solutions like an improved distribution of human capital, increased direct taxes, efficiency of tax, administration, well targeted social protection and a better distribution of socio-economic facilities like roads, electricity, schools, hospitals, etc. as well as an enhanced productivity in agriculture allowed a dialogue of potential solutions between the participants.



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*Lecture 14: Examples and case studies from Nigeria/ Belinda Archibong*

To understand inequality in its complexity several case studies were covered in lectures to brighten the understanding of dimensions of inequality within specific country contexts. The third case study session covered Nigeria as an example, as economic inequality has reached extreme levels, despite being the largest economy in Africa. With the economic potential and abundant human-capital to lift millions out of poverty, horizontal inequality by ethnic group has remained remarkably persistent for wealth, education and access to certain public services. Herein a regional difference in the northern zones specifically on infrastructure access over time can be seen. Moreover, access to education is shaped by ethnicity and a lower wealth in specific regions with little inter-ethnic group variation in wealth inequality allowed the participants to talk about patterns and differences in their respective countries.



## **6. The knowledge-sharing sessions**

The course applied an interactive and inclusive approach. The Participants played an active role in building their knowledge through knowledge-sharing sessions through which they shared their country-specific experiences in order to promote the learning process with practical experience.



The course also provided an opportunity for the participants to become part of a network and to remain in contact with each other and with the organizers after the training.

It furthermore allowed them to benefit from engaging with experts coming from both academic institutions and practitioners. Most trainers participated in the discussion, answered questions and gave food for thought.

## 7. The exhibition

An additional highlight during the training course was the exhibition "Unequal Scenes" by South African photographer Johnny Miller. Unequal Scenes locates the most unequal dividing lines in the world's most unequal societies. It uses a drone to illustrate the inscribed history of our world in a new way.



## 8. The participants

The training course, especially designed to address policy makers from developing countries, brought together officials, among others, from the Provincial Treasury, the Ministry of Finance, the Prime Minister's Office and the Ministry of Community Development and Local Development. To focus on an active exchange, representatives of civil society organisations like the Women and Law Society and the Centre for Public Integrity gave valuable insight into the broader public obstacles and restrictions just as opportunities and chances when discussing issues within the broader context of inequality.



Country-specific expertise was shared from representatives of Malawi, Lesotho, South Africa, Botswana, Zimbabwe and Tanzania.





## 9. The trainers

During an entire week, a high degree of knowledge transfer was ensured through the engagement of 11 trainers, who are renowned academics and professionals from all over the world with distinct expertise in the field of inequalities.



### **Ayodele Odusola**

Resident Representative UNDP, South Africa

Field of work: Development Strategy, Policy Analysis, Macroeconomics, Structural Economic Transformation and Development Economics.

He worked as the Chief Economist and Head of the Strategy and Analysis for UNDP Regional Bureau for Africa. Prior, he served as the MDG adviser for Sub-Saharan Africa, after his tenure as economic adviser in UNDP South Africa. He is also Chair of the UNDP Corporate Technical team on the Least Developed Countries and Landlocked Developing Countries. He holds a PhD in Economics from the University of Ibadan, Nigeria.



### **Belinda Archibong**

Assistant Professor of Economics

Barnard College, Columbia University, United States

Field of work: Development Economics, Political Economy, Economic History and Environmental Economics

Her research investigates role of institutions and environment in inequality of access to public services and the development of human capital. She has received visiting fellowships at the World Bank in Washington, DC, the University of Lagos in Nigeria, and the University of Oxford in the UK. She is a faculty affiliate at Columbia University's Center for Development Economics and Policy (CDEP), The Earth Institute at Columbia University, the Institute of African Studies, the Institute for Research in African-American Studies, the Columbia Population Research Center (CPRC) and the Center for Environmental Economics and Policy (CEEP) at Columbia University. She holds a PhD in Sustainable Development from Columbia University in the United States.



### **Edward Webster**

Professor Emeritus

Society, Work and Development Institute University of the Witwatersrand  
South Africa

Field of work: Labour Studies, World of Work, Political Economy and  
Inequality

He is the founder of the Society, Work and Development Institute (SWOP) at the University of the Witwatersrand and directed it for over twenty years. He was also a Non-Executive Director of the

Development Bank of Southern Africa, the Labour Job Creation Trust, and the Human Science Research Council. He holds a PhD from University of the Witwatersrand, South Africa.



### **Fiona Tregenna**

South African Research Chair in Industrial Development Professor of Economics University of Johannesburg South Africa

Field of Work: Structural Change, Deindustrialisation, Industrial Development, Unemployment, Poverty and Inequality

She holds the South African Research Chair in Industrial Development, is an elected member of the Academy of Science of South Africa, and sits on its Standing Committee on Science for the Reduction of Poverty and Inequality. She is also a part-time member of the Competition Tribunal where she adjudicates competition (anti-trust) cases. She holds a PhD in Economics from the University of Cambridge, United Kingdom.



### **Lwanga Elizabeth Nanziri**

Senior Lecturer: Development Finance University of Stellenbosch Business School South Africa

Field of work: Development Economics, Financial Inclusion for Households and Firms, Behavioral Economics, Gender and Welfare, Public Policy Analysis

She is a British Academy Scholar and the inaugural World Bank-African Economic Research Consortium visiting scholar, hosted by the World Bank's Office of the Chief Economist, Africa Region in Washington, DC. Prior, she undertook research as a Newton International Fellow at the University of Oxford in Development Economics. She is also the director of the Association for the Advancement of African Women Economists in South Africa. She holds a PhD in Economics from the University of Cape Town, South Africa.



### **Mesele Arraya**

Assistant Professor of Economics

Addis Ababa University Ethiopia

Field of Work: Human Capital, Educational Inequality, Youth Labour Market, Economics of Education, Social Protection, Poverty and Inequality

He worked as a quantitative researcher for Young Lives, a project that tracks the lives of 3,000 children in Ethiopia over 15 years. His role in this project was particularly to undertake impact evaluation of several social programs and identify the culpable factors that result in educational inequality among children and young people. Prior, he served as a lecturer in the Department of Economics at the University of Gondar and as a research associate for ADAPT Labor Studies in Italy. He is also currently member of the Ethiopian Core Research Team (CRT) for RISE Project. He has a PhD in Human Capital Development from University of Bergamo (Italy).



### **Murray Leibbrandt**

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Professor

School of Economics University of Cape Town South Africa

Field of work: Poverty, Inequality and Labour Markets Dynamics

He is a Professor in the School of Economics at the University of Cape Town. He holds the National Research Foundation Chair in Poverty and Inequality Research and is the Director of the Southern Africa Labour and Development Research Unit. He is the Director of African Centre of Excellence for Inequality Research within ARUA. He is on the Executive Committee of the International Economic Association and is a Senior Research Fellow of UNU-WIDER. In 1995-96 he served on the President Mandela's Labour Market Commission to advise on post-apartheid labour market legislation and in 2016-17, served on then Deputy President Ramaphosa's Advisory Panel on the National Minimum Wage.



### **Samuel Kofi Tetteh-Baah**

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Doctorate

Center for Development and Cooperation

ETH Zurich, Switzerland

Field of work: Poverty and Inequality, Development Economics

He successfully defended his dissertation on "Measurement and Impact of Horizontal Inequality" in September 2019. During his doctoral studies, he worked as consultant in the Poverty and Inequality Unit of the Development Economics Research Group (DERG) at the World Bank, Washington, DC. He holds an MA in Development Economics from the Georg-August-Universitaet Goettingen, Germany.



### **Selwyn Jehoma**

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Research and Training Director

Global Institute for Social Protection

South Africa

Field of work: Public Financing Training, Social Protection Policy Analysis, Implementation and Service Improvement Experience

He is a Research and Training Director at the Global Institute for Social Protection. He started his working career as a teacher in 1986, lasting 7 years and then worked for 7 years in the private sector. He joined the Financial & Fiscal Commission in 1999 as a Researcher Coordinator. He led a global first in the evaluation of the Impact of the Child Support Grant, and since 2012 has been conducting evaluations, researching and teaching social protection courses in more than 10 countries. He was a member of a technical committee of the International Social Security Association for 8 years. He completed a post graduate degree in Public Management at Stellenbosch University and a post graduate degree in Social Security Management at Wits University (Jhb).

## 10. The training

The approach of the training was a multi-disciplinary one, ranging from science to governance. A holistic approach allowed participants to become aware of the complexity of the topic of inequality, while at the same time enabling them to build skills and expertise in aspects related to the designing and implementation of policies for dealing with inequality.

The conclusions drawn from the various sessions comprise among others:

- There is a need to develop a better understanding of the impact and drivers of different policy outcomes.
- Existing policies are having little impact on inequality reduction. A comprehensive combination of policies needs to be implemented, including ones that stimulate inclusive growth and boost the education system.
- Strengthening social protection measures (or increase the overall social wage) was identified as an effective policy measure.
- Long-term policies should target increases in labour market participation, while cash transfers to poor households can be used to provide crucial supplementary income that can ensure economic access to food and other necessities.
- Corruption needs to be tackled through embedded processes within governments. Increasing transparency is a first step to reducing corruption.
- Governments have to come up with effective individual policies that tackle unfairness to make sure inequalities are decreased.
- It is crucial to stimulate political commitment to these policies.
- There is a need for regional integration for sharing experiences about how we can reduce inequality.

## **11. The next steps**

Addressing inequalities requires coordination between respective actors and an integrated approach, although the bigger responsibility falls on governments, as they are at the centre of policy-making. Governments have significant roles in designing policies, strategies and plans for development.

Recognising these roles, next steps include to

- provide participants with more information on inequality and best practice examples on successful policies
- encourage and promote the participants to engage in national dialogue processes and regional exchange of experience on successful action
- revise the concept and take up the lessons learnt
- design a new edition of the training course, e.g. with a regional focus

## 12. Feedback – “Professionally facilitated and highly qualified learning experience”

Overall, how do you rate the training course in general?  
(1=very poor, 5=very good)

Low to high	1	2	3	4	5	Total responses	Responses on average
	0% (0)	0% (0)	0% (0)	40% (6)	60% (9)	15	4,6

Positive:

- Professionally facilitated, presented by highly qualified and experienced professionals, high quality material
- Very informative and interesting and engaging debates that provided guidance on addressing the issues of inequality and poverty
- Interactive sessions and case studies which gave intensive and inclusive knowledge
- Gender balance of the selected participants and even trainers
- Intensely, timely but relevant, nice group discussions after or during the presentations
- Touched on experiences countries have on inequality, exchange was very relevant

Improvement:

- Time allocation between debate and lecture was too little
- Time allocation between several topics and speakers
- Some presenters were lacking knowledge about some countries even though they were aware of where the participants come from
- Trainings started too late in the day
- The choice of a cross-section of participants should be chosen differently
- Prepare a newsletter from the course to share

## **13. The organizers**

**Bruno Martorano | UNU-MERIT**

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The United Nations University – Maastricht Economic and Social Research Institute on Innovation and Technology (UNU-MERIT) is a research and training institute of United Nations University based in Maastricht in the south of the Netherlands. The institute carries out research and training on a range of social, political and economic factors that drive economic development in a global perspective. Special emphasis is e.g. on (public) policy analysis and evaluation and on the social aspects of growth and development.

**Bernd Lakemeier, Oliver Ehram, Miriam Reiboldt | GIZ**

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The GIZ sector programme “Reducing Poverty and Inequality as part of the 2030 Agenda” advises the German Federal Ministry for Economic Cooperation and Development (BMZ) on implementing the 2030 Agenda, primarily for the SDGs 1 and 10. It highlights inequality as a cross-cutting issue of the 2030 Agenda in political processes and provides its expertise in GIZ's internal and external structures.

## Impressum



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### **Design & content of the Final Report**

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