Training course on Domestic Resource Mobilization for Social Protection

Professional Development Training Course Outline

Category	Social Protection	**Duration**	10 Days
Base Fee	$3,000 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Sustainable social protection systems, capable of providing comprehensive coverage and adequate benefits to their populations, are increasingly recognized as vital for national development, poverty reduction, and resilience to shocks. While external aid and borrowing can play a supplementary role, Domestic Resource Mobilization (DRM) is the primary and most sustainable pathway for financing social protection in the long term. Training Course on Domestic Resource Mobilization for Social Protection is meticulously designed to equip with the expert knowledge and practical methodologies to strategically analyze, design, and implement effective domestic resource mobilization strategies specifically for financing social protection systems. The program focuses on principles of DRM, tax policy reforms, strengthening tax administration, leveraging non-tax revenues, re-allocating public expenditures, addressing illicit financial flows, the political economy of DRM, and developing comprehensive DRM action plans, blending rigorous analytical frameworks with practical, hands-on application, global case studies (with a strong emphasis on African contexts, including Kenya), and intensive tax simulation and policy reform roadmap development exercises. Participants will gain the strategic foresight and technical expertise to confidently identify and unlock sustainable domestic financing for expanding social protection, fostering unparalleled fiscal self-reliance, equitable growth, and transformative social impact, thereby securing their position as indispensable leaders in building financially resilient social protection for all citizens. This comprehensive 10-day program delves into nuanced methodologies for conducting detailed assessments of tax policy effectiveness and compliance gaps in diverse economic contexts, mastering sophisticated techniques for evaluating the revenue potential and distributional impact of various tax reforms (e.g., VAT, income tax, wealth tax), and exploring cutting-edge approaches to strengthening tax administration through digitalization and capacity building, identifying and leveraging innovative non-tax revenue sources (e.g., environmental taxes, digital services taxes, levies), analyzing the potential for re-allocating inefficient public expenditures, and applying political economy analysis to navigate the complexities of tax and financing reforms in countries with significant informal sectors, like Kenya. A significant focus will be placed on understanding the interplay of DRM with broader public financial management (PFM) reforms and national development priorities, the specific challenges of taxing the informal economy and multi-national corporations, and the practical application of data analytics and technology to enhance revenue collection and transparency.

Programme Curriculum

Training Course on Domestic Resource Mobilization for Social Protection

Introduction

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This comprehensive 10-day program delves into **nuanced methodologies** for **conducting detailed assessments of tax policy effectiveness and compliance gaps in diverse economic contexts,** mastering **sophisticated techniques for evaluating the revenue potential and distributional impact of various tax reforms (e.g., VAT, income tax, wealth tax),** and exploring **cutting-edge approaches** to **strengthening tax administration through digitalization and capacity building, identifying and leveraging innovative non-tax revenue sources (e.g., environmental taxes, digital services taxes, levies), analyzing the potential for re-allocating inefficient public expenditures, and applying political economy analysis to navigate the complexities of tax and financing reforms in countries with significant informal sectors, like Kenya.** A significant focus will be placed on understanding the interplay of **DRM with broader public financial management (PFM) reforms and national development priorities, the specific challenges of taxing the informal economy and multi-national corporations, and the practical application of data analytics and technology to enhance revenue collection and transparency.**

Course Objectives

Upon completion of this course, participants will be able to:

1. **Analyze core concepts and strategic responsibilities** of **Domestic Resource Mobilization (DRM)** for sustainable social protection financing.
2. **Master sophisticated techniques** for **assessing the current DRM landscape** and identifying its potential for social protection expansion.
3. **Develop robust methodologies** for **designing and evaluating tax policy reforms** to generate progressive and adequate revenue for social protection.

4. **Implement effective strategies** for **strengthening tax administration and compliance** to enhance revenue collection efficiency.
5. **Manage complex considerations** for **identifying and leveraging diverse non-tax revenue sources** for social protection financing.
6. **Apply robust strategies** for **identifying and re-allocating public expenditures** to create fiscal space for social protection investments.
7. **Understand the deep integration of addressing illicit financial flows (IFFs)** as a critical component of enhancing DRM.
8. **Leverage knowledge of global best practices and lessons learned** from successful DRM efforts for social protection in diverse country contexts, particularly in Africa (including Kenya).
9. **Optimize strategies for utilizing innovative technologies and data analytics** to improve revenue collection and management.
10. **Formulate specialized recommendations** for **navigating the political economy challenges** associated with DRM reforms for social protection.
11. **Conduct comprehensive assessments** of existing social security contribution systems for expanding coverage and revenue.
12. **Navigate challenging situations** such as **large informal economies, tax evasion, weak governance, and political resistance** in implementing DRM strategies.
13. **Develop a holistic, evidence-based, and politically astute approach** to **Domestic Resource Mobilization for Social Protection,** ensuring sustainable and equitable funding.

Target Audience:

This course is designed for professionals interested in Domestic Resource Mobilization for Social Protection:

1. **Senior Officials from Ministries of Finance, Planning, and Social Affairs:** Responsible for national budget formulation, resource allocation, and social sector planning.
2. **Tax Policy Advisors & Revenue Authority Officials:** Involved in designing and implementing tax reforms and improving tax collection.
3. **Economists & Fiscal Analysts:** Working in government, central banks, and research institutions analyzing public finance and development.
4. **Social Protection Program Managers:** Overseeing the financial aspects of program implementation.
5. **Civil Society Organization (CSO) Advocates:** Working on fiscal justice, social protection rights, and accountability.
6. **Development Partners & International Financial Institutions (IFIs):** Supporting governments in DRM and social protection financing.
7. **Public Financial Management (PFM) Experts:** Focused on improving overall public expenditure and revenue management.
8. **Researchers & Academics:** Studying fiscal policy, social protection financing, and development economics.

Course Duration: 10 Days

Course Modules:

- **Module 1: Foundations of Domestic Resource Mobilization (DRM) for Social Protection**
  - Defining DRM: Importance, scope, and principles for sustainable development.
  - The link between DRM and financing social protection floors and systems.
  - Key components of DRM: Tax revenues, non-tax revenues, and efficiency gains.
  - Benefits of strong DRM: Fiscal independence, ownership, and long-term sustainability.

    - Challenges to DRM in developing countries, including Kenya's specific context.
- **Module 2: Assessing the DRM Landscape for Social Protection**
    - Analyzing the current tax-to-GDP ratio and its potential for growth.
    - Identifying existing revenue streams and their contribution to social protection.
    - Benchmarking national DRM performance against regional and international peers.
    - Understanding the size and characteristics of the informal economy and its implications for DRM.
    - Data collection and analytical tools for DRM assessment (e.g., tax gap analysis).
- **Module 3: Enhancing Tax Revenue - Progressive Income and Corporate Taxation**
    - Principles of progressive income taxation and its role in redistribution.
    - Reforming personal income tax (PIT) structures and expanding the tax base.
    - Corporate income tax (CIT) policies: rates, incentives, and international taxation.
    - Addressing tax avoidance and evasion by individuals and corporations.
    - Case studies of successful PIT and CIT reforms for social protection financing.
- **Module 4: Enhancing Tax Revenue - Indirect and Specialized Taxes**
    - Value Added Tax (VAT): Structure, rates, and exemptions, and their impact on equity.
    - Excise taxes: "Sin taxes" (alcohol, tobacco), carbon taxes, digital services taxes.
    - Property taxes and inheritance taxes: Untapped potential and administrative challenges.
    - Trade taxes and tariffs: Their role in revenue generation and economic development.
    - Designing indirect taxes to be less regressive while maximizing revenue.
- **Module 5: Strengthening Tax Administration and Compliance**
    - Modernizing tax administration: Digitalization, e-filing, and online payment systems.
    - Improving taxpayer registration and record-keeping.
    - Enhancing tax audits, enforcement, and anti-corruption measures.
    - Strategies for bringing the informal sector into the tax net.
    - Building capacity within tax authorities: Human resources, technology, and governance.
- **Module 6: Leveraging Non-Tax Revenues for Social Protection**
    - Administrative fees, licenses, and permits: Optimizing collection and transparency.
    - Revenues from state-owned enterprises (SOEs) and public asset management.
    - Royalties and levies from natural resources (e.g., mining, oil and gas).
    - Public welfare lotteries and other innovative non-tax revenue mechanisms.
    - Ensuring accountability and transparency in the use of non-tax revenues.
- **Module 7: Expanding Social Security Contributions**
    - Assessing the current coverage and financial health of social security schemes.
    - Strategies for extending contributory social security to informal sector workers.
    - Reforming contribution rates and benefit structures for long-term sustainability.
    - Improving collection efficiency and tackling non-payment of contributions.
    - Case studies of successful expansion of social security coverage and financing.
- **Module 8: Addressing Illicit Financial Flows (IFFs)**
    - Defining IFFs: Tax evasion, money laundering, corruption, and their impact on DRM.
    - Estimating the scale of IFFs in developing countries, including Kenya.
    - Strategies to combat IFFs: International cooperation, legislative reforms, capacity building.
    - The role of transparency initiatives (e.g., beneficial ownership registries) in curbing IFFs.
    - Recovering illicitly acquired assets and re-channeling them to social protection.
- **Module 9: Re-allocating Public Expenditures for Social Protection**
    - Identifying inefficient or unproductive public spending (e.g., untargeted subsidies, wasteful projects).
    - Conducting public expenditure reviews (PERs) to identify re-allocation opportunities.
    - Analyzing the potential to shift resources from less productive sectors to social protection.

- Optimizing the efficiency of existing social protection programs to free up resources.
    - Political and technical challenges in re-allocating public funds.
- **Module 10: Political Economy of DRM Reforms for Social Protection**
    - Mapping stakeholders: Winners and losers from DRM reforms.
    - Building political will and consensus for revenue-raising measures.
    - Communication strategies to gain public acceptance and trust in tax systems.
    - Addressing corruption and enhancing accountability in revenue management.
    - Designing politically feasible DRM reforms that are equitable and effective.
- **Module 11: Best Practices and Case Studies in DRM for Social Protection**
    - In-depth analysis of countries that have successfully enhanced DRM for social protection (e.g., Brazil, Ghana, South Africa, Rwanda).
    - Examining specific DRM initiatives and their outcomes in the Kenyan context.
    - Lessons learned from both successful and challenging DRM experiences.
    - Discussion on the transferability of best practices to different national contexts.
    - Identifying common pitfalls and how to avoid them in DRM implementation.
- **Module 12: Developing a National DRM Action Plan for Social Protection**
    - Elements of a comprehensive DRM action plan: Objectives, strategies, timelines.
    - Prioritizing DRM interventions based on national context and potential impact.
    - Integrating DRM efforts with broader public financial management (PFM) reforms.
    - Monitoring and evaluating the progress and impact of DRM initiatives.
    - Participants develop a tailored DRM action plan for their respective countries/organizations to strengthen social protection financing, with practical considerations for Kenya.

Training Methodology

- **Interactive Workshops:** Facilitated discussions, group exercises, and problem-solving activities.
- **Case Studies:** Real-world examples to illustrate successful community-based surveillance practices.
- **Role-Playing and Simulations:** Practice engaging communities in surveillance activities.
- **Expert Presentations:** Insights from experienced public health professionals and community leaders.
- **Group Projects:** Collaborative development of community surveillance plans.
- **Action Planning:** Development of personalized action plans for implementing community-based surveillance.
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Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
21 Sep 2026	02 Oct 2026	Online	$2,000
21 Sep 2026	02 Oct 2026	Physical	$3,000
21 Sep 2026	02 Oct 2026	Physical	$0
21 Sep 2026	02 Oct 2026	Physical	$0

Start Date	End Date	Location	Price
21 Sep 2026	02 Oct 2026	Physical	$0
21 Sep 2026	02 Oct 2026	Physical	$0
21 Sep 2026	02 Oct 2026	Physical	$0
21 Sep 2026	02 Oct 2026	Physical	$0

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