

Adhesion Agreement SOUTHMOD_A2.0

- 1 The Licensee hereby agrees to abide by the terms and conditions, which may be amended by UNU-WIDER from time to time, for the use of the SOUTHMOD model bundle ("SOUTHMOD") and the requested input datasets for non-commercial research, where the input datasets pertain to country models specified in the checkboxes in the online model request form (<https://www2.wider.unu.edu/content/southmod-access-models>).

The SOUTHMOD bundle contains each of the above country models, which are part of a family of models ("SOUTHMOD") in Africa, Latin America and Southeast Asia.¹ While all models can be reviewed by the Licensee, running a particular country model requires the availability of input datasets corresponding to the respective country model. These datasets are shared with the Licensee based on the above selection(s).²

- 2 The Licensee shall acknowledge the use of SOUTHMOD in any publications and other outputs (such as conference presentations), mentioning (i) the EUROMOD software version number, (ii) the version number of SOUTHMOD, and (iii) the specific country model(s) that the Licensee is using, as indicated in Section 1.2 of Annex 1.
- 3 The Licensee shall inform the SOUTHMOD team at southmod@wider.unu.edu about the use of SOUTHMOD and shall keep the SOUTHMOD team informed about all related publications.
- 4 The Licensee must not provide SOUTHMOD or the associated input datasets to any third parties. Potential users should contact the SOUTHMOD team at UNU-WIDER directly.
- 5 Access to SOUTHMOD is granted on an 'individual and institutional' basis. If the Licensee changes his/her current employer, institution or organization, this Agreement shall expire automatically. If the Licensee uses SOUTHMOD under a new employer, institution or organization, the Licensee shall inform UNU-WIDER accordingly and shall communicate to UNU-WIDER the new research purposes related to the use of SOUTHMOD. In this case UNU-WIDER will consider issuing a new Agreement.
- 6 Any research papers using SOUTHMOD shall be submitted to UNU-WIDER for consideration for publication in the [WIDER Working Paper series](#).

¹ For information on access to the microsimulation models for South Africa (SAMOD) and Namibia (NAMOD), please contact Southern African Social Policy Research Insights (SASPRI) at info@saspri.org.

² In the case of BOLMOD (Bolivia), PERUMOD (Peru), RWAMOD (Rwanda) and VNMOD (Viet Nam), due to restrictions from data providers, the SOUTHMOD team can only provide the Stata do-files necessary to produce the underpinning input datasets.

- 7 UNU-WIDER reserves the right to share information regarding the name, affiliation and research purposes of the Licensee with the data provider(s) as well as with its institutional funders.
- 8 The Licensee shall familiarize him/herself with, and abide by, the conditions of access to the input microdata that the Licensee makes use of (including, if specified, sharing an electronic copy of research using the model with the data provider) and shall acknowledge the use of these data in any publication.
- 9 The results and their interpretation presented in the resulting publication shall be solely the author's/s' responsibility.
- 10 All rights not expressly granted to the Licensee by UNU-WIDER in this Agreement shall be hereby reserved.
- 11 The Licensee shall indemnify and keep indemnified UNU-WIDER at all times against all or any costs, claims, damages, or expenses incurred by UNU-WIDER, or for which UNU-WIDER may become liable, with respect to the use of SOUTHMOD by the Licensee.
- 12 Any dispute between the Parties concerning the interpretation or application of this Agreement, which cannot be settled amicably, shall be submitted, at the request of either Party to the dispute, to arbitration in accordance with the United Nations Commission on International Trade Law (UNCITRAL) Arbitration Rules then obtaining. The Parties agree to be bound by the arbitration award rendered under this Section as the final adjudication of the dispute.
- 13 Nothing in this Agreement shall be deemed to be a waiver, expressed or implied, of the privileges and immunities of the United Nations, including the United Nations University, which is an autonomous organ of the General Assembly thereof or of UNU-WIDER which is an integral part of the University.

Annex 1

1.1 Citations

SOUTHMOD and EUROMOD

Decoster, André, Jukka Pirttilä, Gemma Wright, and Holly Sutherland (2019). 'SOUTHMOD: Modelling Tax-benefit Systems in Developing countries'. Special issue, *International Journal of Microsimulation*, 12(1).

Institute for Social and Economic Research, University of Essex; Joint Research Centre, European Commission (2023) EUROMOD: Newest version available online (software).

Sutherland, H. and F. Figari (2013). EUROMOD: the European Union tax-benefit microsimulation model. *International Journal of Microsimulation*, 6(1): 4–26

Bolivia

Arancibia, Cristina and David Macas (2024). *UNU-WIDER SOUTHMOD Country Report: BOLMOD v2.1, 2019–2023* UNU-WIDER SOUTHMOD Country Report Series. Helsinki: UNU-WIDER.

National Institute of Statistics, Bolivia (2021). Encuestas de Hogares (2020) ['Household Survey (2020)']. La Paz. Instituto Nacional de Estadística (INE).

<https://anda.ine.gob.bo/index.php/catalog/88>

National Institute of Statistics, Bolivia (2020). Encuestas de Hogares (2019) ['Household Survey (2019)']. La Paz. Instituto Nacional de Estadística (INE).

<https://anda.ine.gob.bo/index.php/catalog/84>

Colombia

Departamento Administrativo Nacional de Estadística (DANE) (2020). 'Gran Encuesta Integrada de Hogares – GEIH – 2019' ['Great Integrated Household Survey 2019']. Bogotá D.C.: Departamento Administrativo Nacional de Estadística. <https://microdatos.dane.gov.co/index.php/catalog/599>

Departamento Administrativo Nacional de Estadística (DANE) (2020). 'Gran Encuesta Integrada de Hogares – GEIH – 2020' ['Great Integrated Household Survey 2020']. Bogotá D.C.: Departamento Administrativo Nacional de Estadística. <https://microdatos.dane.gov.co/index.php/catalog/710>

Rodríguez, David, Johana Silva, and Mateo Zapata (2024). *UNU-WIDER SOUTHMOD Country Report: COLMOD v2.4, 2019–2023*, UNU-WIDER SOUTHMOD Country Report Series. Helsinki: UNU-WIDER.

Ecuador

Ecuador National Statistical Institute (2012). *Encuesta Nacional de Ingresos y Gastos de Hogares Urbanos y Rurales 2011-2012*. Quito: Ecuador National Statistical Institute.

INEC (Instituto de Estadísticas y Censos) (2019). 'Encuesta Nacional de Empleo, Desempleo y Subempleo. ENEMDU – diciembre 2019' ('National Survey of Employment, Unemployment and Underemployment'). Quito: Ecuador National Statistical Institute.

INEC (Instituto de Estadísticas y Censos) (2020). 'Encuesta Nacional de Empleo, Desempleo y Subempleo. ENEMDU – diciembre 2020' ('National Survey of Employment, Unemployment and Underemployment'). Quito: Ecuador National Statistical Institute.

Jara, H. Xavier, Fernando Martín, Lourdes Montesdeoca, Leonardo Vera, and María Gabriela Colmenarez (2024). *UNU-WIDER SOUTHMOD Country Report: ECUAMOD v4.3, 2011–2023*. UNU-WIDER SOUTHMOD Country Report Series. Helsinki: UNU-WIDER.

Ethiopia

Central Statistical Agency of Ethiopia (2019). *Agricultural Producer Prices, from 2014 up to 2019*. Addis Ababa: The Central Statistical Agency of Ethiopia.

Central Statistical Agency of Ethiopia (2020). *2015/16 Ethiopian Household Consumption Expenditure Survey (HCES)*. Addis Ababa: The Central Statistical Agency of Ethiopia.

Central Statistical Agency of Ethiopia (2020). *Ethiopia Socioeconomic Survey, Wave 2 (ESS2) 2013–2014*. Addis Ababa: The Central Statistical Agency of Ethiopia.

Central Statistical Agency of Ethiopia (2020). *Ethiopia Socioeconomic Survey, Wave 3 (ESS3) 2015–2016*. Addis Ababa: The Central Statistical Agency of Ethiopia.

Central Statistical Agency of Ethiopia (2021). *Ethiopia Socioeconomic Survey, Wave 3 (ESS3) 2018–2019*. Addis Ababa: The Central Statistical Agency of Ethiopia.

Shahir, Adnan A., Francesco Figari, and Abas Mohammed Ali (2024). *UNU-WIDER SOUTHMOD Country Report: ETMOD v3.1, 2018–2023*. UNU-WIDER SOUTHMOD Country Report Series. Helsinki: UNU-WIDER.

Ghana

Adu-Ababio, Kwabena, Robert Darko Osei, Prince Baah, and Pia Rattenhuber (2024). *UNU-WIDER SOUTHMOD Country Report: GHAMOD v2.7, 2013–2023*. UNU-WIDER SOUTHMOD Country Report Series. Helsinki: UNU-WIDER.

Ghana Statistical Service (2014). *The Ghana Living Standards Survey GLSS6*. Accra: Ghana Statistical Service.

Ghana Statistical Service (2017). *The Ghana Living Standards Survey GLSS7*. Accra: Ghana Statistical Service.

Mozambique

Castelo, Vanda, Finório Castigo, José Cardoso, Michael Noble, Rodrigo Oliveira, and Gemma Wright (2024). *UNU-WIDER SOUTHMOD Country Report: MOZMOD v3.0, 2015–2023*. UNU-WIDER SOUTHMOD Country Report Series. Helsinki: UNU-WIDER.

Mozambique National Statistical Institute (2010). *Inquérito sobre Orçamento Familiar 2008-2009*. Maputo: Mozambique National Statistical Institute.

Mozambique National Statistical Institute (2015). *Inquérito sobre Orçamento Familiar 2014-2015*. Maputo: Mozambique National Statistical Institute.

Mozambique National Statistical Institute (2020). *Inquérito sobre Orçamento Familiar 2019-2020*. Maputo: Mozambique National Statistical Institute.

Peru

Instituto Nacional de Estadística e Informática (INEI) (2021). Encuesta Nacional de Hogares (ENAHO) 2019. <https://www.datosabiertos.gob.pe/dataset/encuesta-nacional-de-hogares- enaho-2019-instituto-nacional-de-estad%C3%ADstica-e-inform%C3%A1tica-inei>

Instituto Nacional de Estadística e Informática (INEI) (2022). Encuesta Nacional de Hogares (ENAHO) 2020. <https://www.datosabiertos.gob.pe/dataset/encuesta-nacional-de-hogares- enaho-2020-instituto-nacional-de-estad%C3%ADstica-e-inform%C3%A1tica-inei>

Torres, Javier and Rodrigo Chang (2024). *UNU-WIDER SOUTHMOD Country Report: PERUMOD v2.5, 2019–2023*, UNU-WIDER SOUTHMOD Country Report Series. Helsinki: UNU-WIDER.

Rwanda

de Mahieu, Antoine, Jeannette Mukangango, Theogene Harerimana, Jesse Lastunen, Naphtal Hakizimana, John Karangwa, Aimable Mshabinama, Lucie Niyigena, Michael Noble, and Gemma Wright (2024). *UNU-WIDER SOUTHMOD Country Report: RWAMOD v1.1, 2017–2023*, UNU-WIDER SOUTHMOD Country Report Series. Helsinki: UNU-WIDER.

NISR (2021). *Rwanda, Integrated Household Living Conditions Survey, Wave 5, Cross-Sectional Sample, 2016-2017*. National Institute of Statistics Rwanda, 7 March 2021.
<https://microdata.fao.org/index.php/catalog/1839/pdf-documentation>

Mainland Tanzania

Leyaro, Vincent, Elineema Kisanga, Mgeni Msafiri, Michael Noble, Gemma Wright, and Rodrigo Oliveira (2024). *SOUTHMOD Country Report: TAZMOD v2.9, 2012, 2015–2023*. UNU-WIDER SOUTHMOD Country Report Series. Helsinki: UNU-WIDER.

Tanzania National Bureau of Statistics (2014). *Household Budget Survey 2011-2012*. Dar es Salaam: Tanzania National Bureau of Statistics.

Tanzania National Bureau of Statistics (2019). *Household Budget Survey 2017-2018*. Dar es Salaam: Tanzania National Bureau of Statistics.

Uganda

Kaidu, Tina, Ronald Waiswa, Joseph Okello Ayo, Susan Kavuma, David McLennan, Michael Noble, and Gemma Wright (2024). *UNU-WIDER SOUTHMOD Country Report: UGAMOD v2.1 2018–2023*. UNU-WIDER SOUTHMOD Country Report Series. Helsinki: UNU-WIDER.

Uganda Bureau of Statistics (2017). *Uganda National Household Survey (UNHS) 2016/2017*. Kampala: Uganda Bureau of Statistics.

Uganda Bureau of Statistics (2020). *Uganda National Household Survey (UNHS) 2019/2020*. Kampala: Uganda Bureau of Statistics.

Viet Nam

Nguyen, Duong Anh, Minh Binh Tran, Anh Mai Le, and Jesse Lastunen (2024). *UNU-WIDER SOUTHMOD Country Report: VNMOD v3.4, 2012–2023*. UNU-WIDER SOUTHMOD Country Report Series. Helsinki: UNU-WIDER.

Viet Nam National Statistical Institute (2016). *Viet Nam Household Living Standard Survey 2016*. Hanoi: Viet Nam National Statistical Institute

Viet Nam National Statistical Institute (2018). *Viet Nam Household Living Standard Survey 2018*. Hanoi: Viet Nam National Statistical Institute

Viet Nam National Statistical Institute (2020). *Viet Nam Household Living Standard Survey 2020*. Hanoi: Viet Nam National Statistical Institute

Zambia

Kalikeka, Mbewe, Jones Bowa, Miselo Bwalya, Katrin Gasior, David McLennan, and Maria Jouste (2024). *UNU-WIDER SOUTHMOD Country Report: MicroZAMOD v2.16, 2010, 2015–2023*. UNU-WIDER SOUTHMOD Country Report Series. Helsinki: UNU-WIDER.

Zambia Central Statistical Office (2010). *Living Conditions Monitoring Survey 2010*. Lusaka: Zambia Central Statistical Office.

Zambia Central Statistical Office (2015). *Living Conditions Monitoring Survey 2015*. Lusaka: Zambia Central Statistical Office.

Zanzibar

Haji Gora, Issa Hemed, Elineema Kisanga, Vincent Leyaro, Ramadhan Mustapha, Mgeni Msafiri, Michael Noble, Rodrigo Oliveira, Adnan Shahir, and Gemma Wright (2024). *UNU-WIDER SOUTHMOD Country Report: ZANMOD v1.1, 2019–2023*. UNU-WIDER SOUTHMOD Country Report Series. Helsinki: UNU-WIDER.

Office of the Chief Government Statistician, Ministry of Finance and Planning, Zanzibar (2020). *Zanzibar Household Budget Survey (HBS)*. Zanzibar.

1.2 Acknowledgement of the model

The results presented here are based on the tax-benefit microsimulation model for [insert country or countries] in SOUTHMOD_A1.0. Models in the SOUTHMOD bundle are developed, maintained and managed by UNU-WIDER in collaboration with SASPRI (Southern African Social Policy Research Insights), the International Inequalities Institute at the London School of Economics and Political Science, and local partners in selected developing countries (Bolivia, Colombia, Ecuador, Ethiopia, Ghana, Mozambique, Peru, Rwanda, Mainland Tanzania, Uganda, Viet Nam, Zambia, and Zanzibar) in the scope of [the SOUTHMOD project](#). The results presented here are based on EUROMOD version [insert version number here]. Originally maintained, developed and managed by the Institute for Social and Economic Research (ISER), since 2021 EUROMOD is maintained, developed and managed by the Joint Research Centre (JRC) of the European Commission, in collaboration with EUROSTAT and national teams from the EU countries. We are indebted to the many people who have contributed to the development of SOUTHMOD and EUROMOD. The results and their interpretation presented in this publication are solely the author's/s' responsibility.

1.3 Abbreviations

BOLMOD	Tax-benefit microsimulation model for Bolivia
COLMOD	Tax-benefit microsimulation model for Colombia
ECUAMOD	Tax-benefit microsimulation model for Ecuador
ETMOD	Tax-benefit microsimulation model for Ethiopia
EUROMOD	Tax-benefit microsimulation model for the European Union
GHAMOD	Tax-benefit microsimulation model for Ghana
MicroZAMOD	Tax-benefit microsimulation model for Zambia
MOZMOD	Tax-benefit microsimulation model for Mozambique
PERUMOD	Tax-benefit microsimulation model for Peru
RWAMOD	Tax-benefit microsimulation model for Rwanda
SOUTHMOD	Tax-benefit microsimulation models for selected developing countries
TAZMOD	Tax-benefit microsimulation model for Mainland Tanzania
UGAMOD	Tax-benefit microsimulation model for Uganda
VNMOD	Tax-benefit microsimulation model for Viet Nam
ZANMOD	Tax-benefit microsimulation model for Zanzibar