



**Regional Consultations on ‘Principles on Trade Union Development Effectiveness’
Lomé 27-28 May, 2010**

REPORT

Background: introduction on the ‘Principles’ and on the Open Forum

- Development effectiveness is nowadays one of the major themes to be addressed by Trade Unions
- ITUC strategy, ranking development cooperation and capacity building among the political priorities of the organisation; International debate on CSOs role and contribution to development cooperation.
- Presentation on the contents of the Accra Agenda for Action (AAA) and the Open Forum process, composition and objectives.
- Role of the ITUC within the Open Forum and thematic consultations

See Background note and additional preparatory documents on the Open forum (ANNEX 1)

Objectives

The contents of the *Principles* refer to and articulate the values and vision on trade union development partnerships, as well as, on cooperation/coordination features. Therefore, they are focused on the INTERNAL DIMENSION of trade union development effectiveness.

The consultation process is primarily aimed at raising awareness within southern trade union organizations on the contents of the Principles, capturing their perception and point of views, so that to gather additional inputs for their formulation. Indeed, the Principles will eventually need to be accompanied by *Operational Guidelines*, which are meant to identify possible tools/mechanisms facilitating adequate practical compliance of the Principles’ contents.

Therefore consultations are aimed at:

- 1) Discussing and analysing the contents of the Principles from the Southern organisations perspective;
- 2) Strengthening common approaches/visions to development cooperation criteria among trade union organisations (i.e. partnership/coordination...);
- 3) Supporting national, regional and global level effectiveness;

- 4) Gathering contributions for the elaboration of operational guidelines (putting Principles in practice and monitoring our working methods);
- 5) Contributing to the overall consultation process of the OF (GA in Istanbul) on the basis of experience of the trade union movement.

See Principles document (ANNEX 2)

Methodology and Activities

The first consultation on the Principles took place in Lomé, Togo, in the premises of the Trade union national training centre, where also ITUC Africa is based.

The participants to the event were 35 people, from 32 organisations coming from both Anglophone and Francophone African countries, including the presence of 2 European organisation's representatives (involved in the Principles' drafting process), and Global Union Federation representative in the region. Participants' profile was in line with the requirements, as all of them are in charge of training departments within their organisations and/or programme managers.

The two consultations days have been organised as follows:

- 1) consultation on the Principles document: participants have been asked to review the contents of the Principles and to formulate suggestions and remarks in case of need; subsequently, participants have been asked to indicate at least 3 operational guidelines per each of the Principles, according to their own needs; participants have been divided in 4 working groups (2 FR and 2 EN) and results have been reported in plenary for discussion.
- 2) Consultation on 'Enabling environment' for CSOs: also in this case participants have been divided in 2 working groups and have reported in plenary for discussion.

See Participants list (ANNEX 3)

Results

Consultation on Principles and Operational Guidelines

The following contents are the synthesis of the 4 working groups' outcomes mentioned above.

Context

The groups suggested that this section should include a short underlying history of the trade union development cooperation. This element has been touched in the background paper that the principles are promoting a coherent global framework and shared ownership of development cooperation initiatives. The other element in the background which should be reflected in the context is the aim of the network to improve the coordination of trade union

actors in development and support empowerment of the organisations in the south. To address the challenge to define and strengthen working mechanism and methodologies which have indeed direct implications and consequences on the effectiveness of our development cooperation initiatives.

Purpose of the principles

Trade union effectiveness: a sentence at the bottom of the paragraph should be made the opening sentence. And should read: trade unions are both a social partner in the tripartite relations with employers, governments and workers and also part of the civil society.

Democratic Ownership

The groups suggested that the word partner in the definition of the principle in the second sentence should be change to partnership.

> Oprational Guidelines:

- Consultations of the membership should be encouraged by way of adequate participation of the representatives in the organs of the organization (the role of base structures should be promoted during the needs assessment phase and strategic planning);
- Engage the different levels of the organization to finalize the project's contents before eventual formalization with the support partner organization;
- Adequate communication of the final agreement should be shared to all relevant representatives before the implementation;
- Involve all the relevant representatives in the monitoring and evaluation of the project.

Partnership

The groups were satisfied with the text in the description of the principle. The following guidelines were developed:

> Oprational Guidelines:

- Make the Principles document disseminated as a common base of values for partnerships;
- Agreements on the development cooperation's initiatives must be signed, including a memorandum of understanding to stipulate terms, conditions and roles concerning the intervention;
- Agreements should be done in full respect of each organization's role and prerogative to determine their own objectives and internal functions;
- Partners should recognize and use local expertise in the implementation of the project and where external expertise is required it must be supported by an internal technical expert;

Autonomy

In the definition of the word autonomy the groups suggested the following: trade unions commit to respect the autonomy and the ability to make decisions and take action without political interference.... To be highlighted also that 'donor organizations commit to

respect the ability of beneficiary organizations to make their own internal decisions without external interference’.

Also the sentence “...and it is a precondition for Autonomy with north-South trade union relations” should be taken off as it is not clear.

Participants underlined Autonomy as the most important element on the basis of democratic principles. Autonomy is essential both in the North, as unions should be able to put forward their priorities to their national governments, and in the South, preserving their independence from external support’s influence.

Alliances with governments/employers may be necessary in some situations to safeguard the interest of workers. Alliances which do not compromise the position of trade unions or affect their judgment should be regarded positive and necessary.

> **Operational Guidelines:**

- All trade unions must ensure that their standard internal democratic practices are institutionalized
- Organizations in the partnership must be free to select appoint their own project officers to run projects on equal opportunity bases.
- creating effective systems to ensure the financial autonomy of the organisation, meaning 1) collecting dues system and 2) developing activities/services to workers
- supporting functional and performing administration within the organisations

Transparency

Group members conferred with the text in the description o the principle and developed the following guidelines to implement the principle.

> **Operational Guidelines:**

- Reinforcing communication and information sharing bottom-up
- Developing bilateral and multilateral projects among TU partners which have to be shared
- Providing a platform/framework for information sharing among TU partners
- There must be periodic reporting involving financial narrative progress and reports be made available to both partners.
- Partners must have access to information on the project any unit time.

Accountability

The groups were satisfied with the text in the description of the principle. The following guidelines were developed:

> **Operational Guidelines:**

- put in place control and follow up mechanisms within our organisations
- Evaluating activities and seeking feedbacks from stakeholders
- set up results joint evaluation mechanisms with donor organisations

- Impact assessment and evaluation reports should be made available to representatives of the members.
- Providing capacity building of all accounting officers of the project in order to prepare accurate financial reports on the projects.
- Project reports should be audited regularly
- Audited reports should be available to partners and the members representatives

Coherence

The groups were satisfied with the text in the description of the principle. The following guidelines were developed:

> Operational Guidelines:

- Developing a strategic framework for the formulation and execution of development initiatives
- regular updated database on trade union initiatives in development cooperation
- being regularly informed on the global context, the trade union agenda at international/regional level and cooperation practices
- A forum for sharing information on projects among all partners to avoid duplication of initiatives
- set up an organ granting evaluation and respect of different levels of coherence

Inclusiveness and Equality

The groups were satisfied with the text in the description of the principle. The following guidelines were developed:

Operational Guidelines:

- Adoption of policies and structures for consultation of the special/marginalized groups
- Introduce quotas (affirmative action) during implementation of development programs
- Building and maintaining a database of all the special/disadvantaged groups in the union (organization)

Sustainability

The groups were satisfied with the text in the description of the principle. The following guidelines were developed:

> Operational Guidelines:

- foresee a part of own resources to give follow up to projects after external support has ended (such as human capacity resources to be used after the completion of the project)
- Begin to set aside special funds for project activities, so that to ensure the project sustainability
- Strengthening technical human capacity to carry out the projects.
- Partner with employers to establish an education /training fund for workers.
- special funds (income generating activities) should be created to implement projects

- developing effective/permanent policies and strategies for recruiting new members and new sectors
- creating effective financial systems management for a better use of resources
- Evidence of dues payment

Consultation on CSOs enabling environment and Operational Guidelines

The following contents are the synthesis of the 2 working groups' outcomes mentioned above.

The *Accra Agenda for Action* recognises that CSOs have a major role in the national development policies formulation and to respect their autonomy. How can these statements be translated into practices?

Definition of enabling environment: “a set of interrelated conditions – such as legal, bureaucratic, fiscal, informational, political, and cultural – that impact on the capacity of development actors to engage in development processes in a sustained and effective manner”.

Participants were asked to address this issue following 3 level of analysis:

- ***CSOs Recognition: political and legal factors***
- ***CSOs Promotion: access and space to participate in decision making/consultation processes***
- ***CSOs Functioning: financial support mechanisms for organisational capacity***

Eventually they have been requested to rank at least 3 conditions that should be granted by governments/donors in order to let CSO working effectively, on the basis of their daily work's challenges of their own field experience.

WG 1

Characteristics of Enabling Environment

Political stability: if the political situation of a country is not stable also the development effectiveness will be hindered

Democratic and good governance: should provide for freedom of association, freedom of expression etc.. (ILO conventions)

Economic stability

Effective social Dialogue platform: this will enable trade unions in getting involved in policy formulation, bipartite and tripartite meetings

Need for recognition by Donor organisation of Trade Union role in development policies and programs

Guidelines:

- > Mapping out CSOs at national level to have a broader view and understanding of what they do and with which resources
- > capacity of TU to access funds: increasing skills
- > easy accessibility of information of the funds

WG 2

Juridical/Institutional dimension: ILO conventions 87 and 98 are often violated by employers and governments

Promotion: trade union activities are often confronted with the lack of attention from media coverage, hampering wider reflection on public opinion on the role of unions

Financial support: some governments do support unions at national level, but this is not often the case in general terms

Guidelines:

- > put in place a formal framework for conflict resolution and management
- > supporting the access and visibility of trade union actions to wider public (media coverage)
- > Financial assistance : direct support to unions should be homogeneous and coherent

WG 3

Administrative level: CSOs and TU are not involved adequately in policy formulation and decision making processes (when consultations occur they are usually on too late notice for effective participation)

Operational level: donors often impose very heavy conditions like complex procedures for funding; not prioritizing on the basis of beneficiaries needs; scarce resources to Trade unions, and not always adequate.

Guidelines:

- > Reinforcing Capacity of TU official to manage projects
- > Procedures should be simplified (also role of the ILO)
- > Priorities of local organisations should be taken into account

WG 4

Strength of CSOs: their strength is expressed by their representation capacity in the field both in quantitative and qualitative terms. Their added value is the capacity to cope to realities in the field. CSOs should also be able to build up partnerships to get influence in policy making and collective participation.

Guidelines:

- > Reinforcing capacity of CSOs at political/financial level

Main Conclusions

On the basis of the working group outcomes on Principles document, participants have been asked to carry out a final evaluation on practical consequences for the Trade Union Development Cooperation Network (TUDCN), highlighting the role of different components of the TUDCN and their functions

FRENCH WG

1. What do you understand the role of TUDCN to be?
 - Creating a synergy among trade union organisations at national/regional/global level and fostering coordination of information in order to involve them in development cooperation
2. What would you report to your national centres/GUFs and how?
 - Written report to the management
3. How do you think to use the information provided during the trainings/consultation?
 - Multiplying information activities towards the basis of affiliates
4. What would you like ITUC-Africa to do for the TUDCN?
 - Technical , material, financial support
5. What are the priorities of the TUDCN?
 - Reinforcing organisational capacity of member organisations
 - Strengthening communication/information tools and endorsing coordination

ENGLISH WG

1. What do you understand the role of the TUCDN to be?
 - TUCDN would provide a platform for information sharing on development cooperation activities among member organizations/trade unions for effective trade union development.
2. What would you report to your National Centre and how?

What to report:

- That there is a new Network formed on trade union development cooperation
- That the Network is in the process of expanding its membership base
- That our National centers are part of the Network
- That our National Centers have contributions to make towards the effectiveness of the new Network
- That National Centers collaborate among themselves on development cooperation issues

How: submission of report

3. How would you use the information you have received during the consultation?
 - Apply the knowledge to our work as Project Coordinators
 - Share the information with colleagues at work
 - Integrate development cooperation issues in our training programs

4. What would you want ITUC-Africa to do in terms of the Network?
 - Disseminate information on the Network to its members
 - Establish a Regional Chapter of the Network (staff)...towards regional identity of the network
 - Coordinate the work of the Network at the Regional level
 - Build the capacity of members on development cooperation issues

5. What should be the priorities of the Network?
 - Facilitate Information sharing
 - Facilitate Capacity building
 - Coordinate activities of development cooperation

ITUC/DCE/PS
Brussels, 04/06/10