



# ILO – EVALUATION

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- **Technical Backstopping Office:** ACTRAV
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This evaluation has been conducted according to ILO's evaluation policies and procedures. It has been quality controlled by the ILO Evaluation Unit

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**List of abbreviations and acronyms**

ACTRAV	Workers Activities Bureau, ILO
AFL-CIO	American Federation of Labor – Congress of Industrial Organizations
ASRY	Arab Shipbuilding & Repair Yard
ATUC	Arab Trade Union Confederation (ITUC)
BLUFF	Bahrain Free Labour Unions Federation
BWI	Building & Woodworkers International
CGTL	Confédération Générale des Travailleurs Libanais
C87	ILO Convention 87 (Freedom of Association and Protection of the Right to Organise)
C98	ILO Convention 98 (Right to Organise and to Bargain Collectively)
CBA	Collective Bargaining Agreement
CSO	Civil Society Organisation
CTA	Chief Technical Advisor
DWCP	Decent Work Country Programs
DWU	Domestic Workers Union (Lebanon)
ETUF	Egyptian Trade Union Federation
FENASOL	National Federation of workers and employees trade unions in Lebanon
FES	Friedrich Ebert Stiftung
FITUJ	Federation of Independent Trade Unions in Jordan
FOA	Freedom of Association
FPRW	Fundamental Principles and Rights at Work
GEFONT	General Federation of Nepalese Trade Unions
GFBTU	General Federation of Bahrain Trade Unions
GFJTU	General Federation of Jordanian Trade Unions
GFOTU	General Federation of Oman Trade Unions
GFYTU	General Federation of Yemeni Trade Unions
GLU	Global Labour University
GUF	Global Union Federation
ICATU	International Confederation of Arab Trade Unions
IDWF	International Domestic Workers Federation
ILC	International Labour Conference
ILO	International Labour Organisation
ILS	International Labour Standards
IndustriALL	GUF for the mining, energy and manufacturing sectors
ITF	International Transportworkers Federation
ITUC	International Trade Union Confederation
IUF	International Union of Foodworkers
LO NORWAY	Norwegian Confederation of Trade Unions
MAGNET	Migration and Governance Network project (ILO)
MIGRANT	Labour Migration Branch of the ILO
oPt	occupied Palestinian territories
PGFTU	Palestine General Federation of Trade Unions
PROWD	Promoting Rights of Women Migrant Domestic Workers in Lebanon (ILO project)
PSI	Public Services International (GUF for public sector services)
SARTUC	South Asia Region Trade Union Council
ToT	Training of Trainers
TUCC	Trade Union Coordinating Committee (Lebanon)
UNI	Union Network International (GUF for services sectors)

# 1. Executive summary

## **Project Background**

The **purpose of the project** is to develop the capacity of workers' organizations in the Arab region to participate effectively in policy debates, influence public decisions, and defend workers' rights and interests. The **objectives** of the project were: **1)** Strengthening the institutional capacity of workers' organizations, **2)** Strengthening the technical capacity of workers' organizations and **3)** Supporting workers' organisations in advocacy on fundamental principles and rights at work.

The design of the project supported workers' organizations in enhancing their internal democracy and independence through various methods, and providing technical support and policy advice. As a result, workers' organisations would be better equipped to engage in social dialogue, be more democratically representative of the workers in their respective countries and better equipped with knowledge and skills to engage in policy discussion.

The project was designed just prior to the waves of popular movements and protests that swept the Arab Region in 2011, and in which workers and trade unions took active part in these democratic actions.

As the project progressed, it was affected by an increase of direct and indirect government pressure on reformed 'historic' unions and new independent unions. At the same time, broader conflicts and crises in the region increased levels of insecurity and fear in workplaces and communities. Most of the unions and federations supported by the project are fragile and vulnerable to pressure from governments, employers and external political and/or religious forces.

After a review of constraints and opportunities in the region's countries in a rapidly changing political landscape, the project focused on workers' organisations in Bahrain, Jordan, Oman, Lebanon, the occupied Palestinian territories and Yemen.

A one-year extension was approved in 2014, refining the project strategy and activities in response to the changing political environment in the region.

## **Evaluation Background**

The **purpose of the final independent evaluation** is to examine the efficiency, effectiveness, relevance, impact and sustainability of the project. This report reflects the findings from the evaluation on whether the project has achieved its stated objectives, produced the desired outputs, and the extent to which the outcomes have been achieved. It identifies strengths and weaknesses in the project design, strategy and implementation as well as lessons learned, with recommendations for ILO's consideration in designing future interventions.

The evaluation covered each component of the project, and its entire duration. The scope of the evaluation included the multiple geographical dimensions of the project, and included fieldwork in Lebanon, Jordan, Oman and Bahrain. The evaluator met workers' organisations, independent experts, and other stakeholders and partners.

The **clients of the evaluation** include: the ILO Regional Office for Arab States, the project team, the technical backstopping staff, members of the steering committee, the constituents in the target countries, and the donor.

**The evaluation methodology** included:

- Desk review of relevant documentation,
- Interviews with ILO management, technical experts, project staff, DWT, as well as stakeholders, beneficiaries, partners, and other informants,
- A debriefing meeting to present the findings of the evaluation and solicit feedback and additional factual information,
- Preparation of draft and final reports.

The evaluation was conducted between March and May 2015 and comprised field visits to Lebanon, Jordan, Oman, and Bahrain, in addition to phone interviews. The evaluation was managed by Mr Torsten Schakel, Senior Labour Standards Specialist, ILO DWT for ROAS, in coordination with Ms Nathalie Bavitch, Monitoring and Evaluation Officer, ROAS.

## **Main Findings**

### ***Relevance and Design***

The project approach remains highly relevant to the current trends and patterns of workers' issues. As the project progressed, it was affected by an increase of direct and indirect government pressure on reformed and new independent unions. At the same time, broader conflicts and crises in the region increased levels of insecurity and fear in workplaces and communities. Most of the unions and federations supported by the project are fragile and vulnerable to pressure from governments, employers or external political and/or religious forces.

The strategy for the project was to promote and support change in the sense that where existing organizations were compromised and not willing to embrace reform, the project would provide assistance to workers in establishing alternative trade unions. This was a major break with previous international support in the Arab region to unions that were often too close to governments and/or political parties. This new approach remains entirely appropriate, and fits the ongoing trends and patterns of workers' issues in the region.

Nevertheless, evaluation interviews revealed remaining disagreements, disputes and contradictory policies between and within national, regional and international trade union organisations on strategies to support trade union development in the region. It was also particularly noticeable that the project did not seek to engage with the relevant GUFs which have members and activities in the countries concerned, even though the project worked directly with some workplace and national sector unions and federations.

On the other hand, the project objectives are clearly aligned with the ILO Global Programme and Budget Outcome 10 (Workers capacity and representation), as well as ILO DWCPs where they are in place (Jordan, Oman, occupied Palestinian territories), with the constituents objectives, and fitted well with the donor priorities at the time of its inception.

The project contributed significantly to the ILO's goal of gender equality, as well as national and regional gender policies and strategies. It contributed to increasingly articulate and open-minded policies and attitudes about gender equality in some of the new (or newly) independent unions with clear examples of strong and articulate women emerging as leaders. Nevertheless, there remains considerable conservative resistance to the inclusion of gender issues in organising, representation and policy formulation, particularly from some of the 'historic' union federations, along with a culture of token representation of women in project activity.

There is generally a coherent and logical correlation between objectives, outcomes and outputs. The correlation between the original outcomes and outputs and those of the revised proposal for the project extension were not entirely clear. A consolidated single framework would have been useful.

In addition, there was confusion between outputs and outcomes, and the measurement of results was made more difficult by the lack of indicators for outcomes, rather than outputs, in the logframe and M&E plans.

### ***Effectiveness***

Despite the very difficult political context, many of the project's activities were successfully delivered, and there is evidence that many of the desired outcomes were achieved within the countries and workers' organisations included.

The core work of **Objective 1** was to consolidate internal democracy, representativeness, freedom and independence of workers organisations. Action plans with trade unions were developed in all targeted countries. New workers' organisations were established in Jordan and Lebanon, bylaws of workers' organisations in Lebanon and Oman were revised, and general assemblies were conducted in Oman, Bahrain and Jordan without external interference. Initially promising work in Yemen was forced to be curtailed because of the security situation.

In addition, the project had an important role in the preparation of the Founding Congress of the ITUC Arab Region (ATUC) in 2014, providing a direct challenge to ICATU, which had lost all credibility.

The most important element within **Objective 2** was the implementation of a comprehensive training programme, which achieved considerable success in Lebanon, Jordan, Oman and Bahrain, and to a lesser extent in oPt. In all countries, trainers received training in educational methodology and techniques and in some of the key issues. Although there was no measurement of the increased capacity in terms of skills and knowledge, to a lesser or greater extent, the unions report having the capacity to develop and deliver their own training programmes. Furthermore, there is clear evidence of impact on the participating unions regarding internal democracy practices, collective bargaining, and gender equality.

On the other hand, the establishment of the Labour Education and Research Network for the Arab Region did not materialize beyond the construction of a basic list of resource people.

The project has also produced knowledge products and thematic briefs, however there is scope for considerable improvement in their dissemination and use for raising awareness and policy debate.

It has proven difficult to assess the stated intended outcomes of **Objective 3**, which were introduced only in the final year of the project. This is partly because of the few project materials available in English covering this objective's activities, but also that it may be still too early to judge. In terms of support provided to workers organizations in advocacy on FPRW, it is not clear whether an action plan was developed. A study on the role of unions in advocating for social protection was conducted, however the strategy and position on social security and informal economy was not concretized as of yet. In addition, advocacy material on FPRW were produced, however dissemination was still limited.

The project was subject to a mid-term evaluation, of which the recommendations were largely achieved, particularly in concentration on the consolidation of achievements, rather than initiating new tasks.

### ***Efficiency and management arrangements***

The original decentralised model of national officers working in each country was not successful. The appointed officers became submerged by organisational administrative work and mediation between the Beirut team and their respective federations, in addition to challenges related to insufficient competence and capacity.

It was noticeable that the core project team in Beirut were currently all male, which does not provide a good example in relation to the objectives of increasing participation and leadership of women.

It is not clear whether the Advisory Committee had a significant role in helping to steer the project forward, and whether its composition was the most effective in providing good quality advice.

### ***Impact and Sustainability***

There is no system in place to measure the impact of the project at the end. In fact, even when indicators are reached, they do not allow for measurement of results, and how they impact on the development objective is not established.

Despite this, it is noticed from the practices of the targeted workers organizations that the project has had some positive impact on their capacity to defend workers' rights and promote their interests, despite some major shifts and reversals in the political context and, to a varying extent, from country to country. In many cases, training and support resulted in strengthened governance of the organizations (through amendment of constitutions), as well as the practice in some cases of successful collective bargaining over terms and conditions with employers. Furthermore, workers organizations implemented training programmes as a result of the TOTs received. Results however were less tangible when it came to capacity in policy debates, advocacy, FPRW, and labour law reforms.

It can be noted on the project strategy that, despite problems of external interference, weak democratic governance of trade union structures, restrictive labour laws and absence of many other elements of FPRW, which had been prevalent in the region for decades, the project attempted to address these problems and introduce reform in a relatively very short space of time.

Concern for sustainability has been a core factor throughout the project, particularly concerning the future sustainability of the democratic and independent unions supported through project activities. This has included the development of the training capacity of the unions to deliver programme beyond the life of the project; financial sustainability through improved collection and management of union dues; political sustainability through labour law reform to enable legal registration and recognition of democratic unions; and the sustainability of collective bargaining and participation in tripartite negotiations through improved economic and legal literacy.

However, little or no attention was given to ensuring linkages and support from the relevant Global Union Federations at a sector level, capable of providing long-term support after the end of the project or other supportive ILO intervention.

The unions are still at an early stage of development, and require further support to reach full sustainability, as recognised by the project team and the mid-term evaluation, and a continuation of the work of the project is therefore vital for a further period.

### **Conclusions**

1. The project has had an impact on the capacity and practices of democratic trade union organisations in the participating countries. Continuation is an urgent and essential priority to ensure their development and survival in a hostile political landscape.
2. There is a lack of policy dialogue and strategic coordination between regional and international trade union organisations, and with supportive donor organisations, on strategy for support of democratic unionism in the region, which threatens the effectiveness of future project activities.
3. Overall the project had little visibility in terms of dissemination and circulation of project materials and experiences which have been poor, especially in the English language. Project beneficiaries would benefit from translation of material from outside the region into Arabic.
4. There is a problem of attribution, and danger of duplication or contradictory project activities of external donors, international NGOs and agencies, and international trade union federations.
5. There is an urgent need to address the trade unions' need for financial sustainability through the payment, collection and recording of dues.
6. The project should continue to address the need for training in basic economic literacy, but pay more attention to the conversion of policy documents into workers' education materials in print and social media.
7. The ToT programme has been particularly successful and delivered to a high professional standard, thus providing the backbone of the project.
8. Progress has been achieved in improving the visibility and empowerment of women, yet the conservatism on gender issues in parts of the region's union movement remains a serious threat.

## Lessons Learned

- Projects that seek to strengthen workers' organisations free from legal constraints or external interference should ensure that the support is sustained and rigorously defended if external pressure persists in opposition to FPRW. Project design should take into account the possible need for continued supportive intervention beyond the time-frame of the project itself, whether for newly formed or reformed older trade union structures.
- The need to provide support for workers' organisations free from legal constraints or external interference is not limited to any one world region alone. Although each region has its own characteristics, projects supporting the capacity of workers' organisations should include the use of examples of successful (and unsuccessful) methods and experiences from other world regions, and should facilitate and encourage inter-regional dialogue between workers' organisations.
- There are major differences in policy, approach and strategy held between different institutions of the international democratic trade union movement in the promotion of FPRW in the region. Efforts to strengthen the capacity of workers' organisations are hampered by lack of coordination and, in some cases, contradictory actions by trade union institutions and partner agencies. The ILO has unique status and authority to provide an open space for constructive dialogue and consultation, and seek consensus wherever possible in support of democratic trade union development.
- The dissemination of project materials is an essential means of multiplying the impact of the project and maximising the number of beneficiaries. Project design should include the conversion of technical material into popular workers' education resources, using mass media, social media as well as traditional print and online publications. Project design should also include the translation of materials into other languages, for dissemination outside the region, where appropriate.



- Projects designed to increase the capacity of workers organisations in promoting and defending FPRW need to recognise the important role of and engage with sectoral unions, national sectoral federations, and the Global Union Federations in providing sustained and long-term support to trade union development, alongside the national centres and their international federation structures. See Appendix IV.

### **Emerging good practices**

- A careful and sensitive approach towards financial support for fragile, precarious or nascent workers' organisations, which did not endanger their long term sustainability through the development of financial dependency on external donors.
- High quality training of trainers provision, based on robust pedagogical methodology. This led to the establishment of teams of trained volunteer trainers, able to deliver substantial local and national training events for members and activists with very little further support or assistance. This provides a good basis of a sustainable trade union education and training programme appropriate for unions with limited resources. It is an objective frequently proposed in capacity-building projects, but rarely achieved.

### **Summary of Recommendations**

1. Focus support towards democratic and independent unions in those countries where progress is possible.
2. Promote, develop and implement a program that aims at reforming 'historic' unions and their relationships with governments.
3. Facilitate regular discussion on strategy and policy in support of democratic trade union development in the region.
4. Focus capacity-building on organising skills and sustainability.
5. Continue to strengthen the participation of women.
6. Establish a coherent dissemination plan.
7. Improve project design by employing outcome based instead of output based planning in order to strengthen the results based management as well as monitoring and evaluation of project outcomes.

## 2. Project background

The following sections briefly summarize the project by providing an outline of the environment in which it has been initiated, its objectives and planned outputs as defined in the project design document and the Logical Framework Matrix, and an overview of the management and implementation structure.

### **Project Environment**

The project was designed just prior to the waves of popular movements and protests that swept the Arab Region in 2011, and where workers and trade unions took active part in these democratic actions. The project stemmed from the analysis that countries with an active trade union movement, characterized by democracy and independence, even in relative terms, have witnessed a leading role for trade unions which have provided an umbrella for the societal and popular democratic movements. In contrast, countries where the trade union movement was compromised, subordinated and dependent, have witnessed the manipulation of these union structures as tools under the oppressive control of the authorities, creating circumstances for the promotion of new independent trade unions.

The Arab uprisings showed that the greater the deficits in real and genuine participation of workers, the less responsive were the policies and priorities to people's needs and aspirations. This stark contrast has highlighted the powerful potential of unionism – and brought it forward as a key development priority. The on-going events in the region have confirmed that in the absence of genuine mechanisms for social dialogue with inclusive, equitable and independent workers' representation, workers and people at large resorted to extra-institutional channels and actions to voice their demands, rights, and interests.

At the beginning, before the so-called Arab spring, the project was thought of as an adequate response to the prevailing situation in the region which was characterized by the absence of the rule of law, genuine democracy, freedom of association, freedom of speech and freedom of press, where the trade union movement was neither free nor representative, and the NGOs severely controlled.

The objectives of the project had to take into consideration the scale of the informal economy, inward labour migration, the regional characteristics of unemployment and the structure of the economy. At the same time, according to the analysis of ILO staff, there were severe problems to be faced in labour and employment legislation, poor social protection coverage, and an absence of dialogue with employers' organisations. Most importantly, the region is characterised by strong links (including financial subsidies) between unions and the government, low union membership, and low credibility of unions for the workers themselves, which increases the difficulties facing democratic unions attempting to organise.

## Objectives, scope and outputs of the project

The overall project objective was to develop the capacity of workers' organizations in the Arab region to participate effectively in policy debates, influence public decisions, and defend workers' rights and interests. The immediate objectives of the project were:

- 1) Strengthening the institutional capacity of workers' organizations; and
- 2) Strengthening the technical capacity of workers' organizations.

On the institutional level, the project supported workers' organizations in enhancing their internal democracy and independence through various methods, ranging from reforming internal bylaws, using ILO supervisory mechanisms, expanding outreach for workers and holding General Congresses. Moreover, on the technical level, the project supported workers' organizations through policy advice, production of knowledge materials and conducting workshops on priority issues for the labour movement.

Following the one year extension a third immediate objective was added: 3) Supporting workers' organization in Advocacy on fundamental principles and rights at work.

*In the M&E plans of the original project proposal and subsequent extension proposal, there is considerable confusion between objectives, activities, indicators, outcomes and outputs. Rather than attempt to unravel the confusion to present outcomes and outputs in the format suggested for evaluation, the evaluator has been obliged to consolidate a set of the original objectives, activities, indicators and outcome/output designation as set out in the two originals.*

<b>Immediate Objective 1: Institutional capacity of workers' organisations strengthened ORIGINAL PROJECT (2012-14)</b>		
<b>Activity</b>	<b>Indicator</b>	<b>Output/ Outcome</b>
1.1. Assess the needs of workers' organizations	Needs assessment methodology developed	Output
	Number of needs assessments conducted and validated	Output
	Increased knowledge of needs among relevant actors	Outcome
1.2. Develop strategies and action plans for workers' organizations	Number of strategies and action plans developed	Output
	Consolidated internal democracy, representativeness, freedom, and independence of workers' organizations	Outcome
	Number of observations submitted by workers' organizations for ILO supervisory mechanisms	Outcome
<b>REVISED PROJECT (2014-15)</b>		
<b>Outcomes, outputs</b>	<b>Indicator</b>	<b>Level</b>
Training capacities of workers' organizations enhanced	Number of workers' training and education units established in targeted countries	Outcome
Capacity of TUs in organizing workers improved	Informal workers' unit/structure established within the General Federation of Yemen Trade Unions	Outcome
TUs in the region have a coordinated strategy on priority trade union issues	One background paper setting the topical priorities of the region to be discussed in the upcoming ITUC Arab Founding Congress	Outcome
Improved institutional structure	Number of training needs assessments conducted	Output

within workers' organizations to improve the outreach of workers	and validated	
	Number of training workshops conducted by local trainers	Output
	Number of TUs organizers trainings in FENASOL/ Lebanon and Yemen (newly established) trained	Output
<b>Immediate Objective 2: Technical capacity of workers' organisations strengthened</b>		
<b>ORIGINAL PROJECT (2012-14)</b>		
<b>Activity</b>	<b>Indicator</b>	<b>Output/ Outcome</b>
2.1. Provide workers' organizations with technical inputs on priority issues	Number of briefs developed and shared	Output
	Number of position papers issued by workers' organizations	Outcome
	Number of legal amendments proposed by workers' organizations	Outcome
2.2. Implement a comprehensive training program	Number of project focal points trained on training methodology and issues	Output
	Number of trainers trained	Output
	Number of workers trained by the trainers	Outcome
2.3. Establish a Labor Education and Research Network for the Arab Region	Number of joint meetings held between trade unionists, civil society activists, and labor educators and researchers	Output
	Number of resource persons in the developed database	Output
	% of meeting participants who make regular use of the network	Outcome
<b>REVISED PROJECT (2014-15)</b>		
<b>Outcomes, outputs</b>	<b>Indicator</b>	<b>Level</b>
Workers organizations are better equipped to participate in policy debates on priority issues	Thematic literacy briefs on informal economy, migration and social protection effectively used for raising awareness and policy debate	Outcome
Knowledge products developed to improve to provide quality technical support for Trade unions	A study on the informal economy in Yemen developed and shared	Output
	Number of training modules developed	Output
	Number of pilots training on thematic training modules conducted	Output
<b>Immediate Objective 3: Supporting workers' organisations in advocacy on fundamental principles and rights at work</b>		
<b>REVISED PROJECT (2014-15)</b>		
<b>Outcomes, outputs</b>	<b>Indicator</b>	<b>Level</b>
Workers' organizations are in a better position to advocate for FPRW	1 common action plan between civil society organizations and workers' organizations on selected labour issues	Outcome
	Workers' organization have a common strategy and position on the issue of social protection and the informal economy	Outcome
Freedom of association and basic workers' rights gain ground in public opinion	Number of advocacy materials on the right to Freedom of Association and Collective bargaining developed.	Output

The direct beneficiaries of the project included women, men, young, migrant, and unorganized workers in the formal and informal economies, as well as leaders and members of independent, free, and representative workers' organizations committed to social justice and democracy in the eight countries. Where no such workers' organizations exist, support was provided for encouraging and enabling their establishment through training and technical advice on financial autonomy and management training. A key emphasis in planning and delivery was the inclusion of the right to organize and bargain collectively of informal workers, migrant workers, women, and youth. The project was active in Lebanon, Jordan, Oman, Bahrain, Yemen, and oPt.

In 2014, an internal mid-term evaluation of the project was conducted that underlined the progress and achievements of the project while noting its shortfalls. The findings of the mid-term evaluation were taken into account when deciding on the activities for the remaining lifetime of the project.

## **Organisational arrangements for implementation**

### **Management and Implementation Team**

The overall management and implementation of the project is the responsibility of the CTA based in ROAS and working under the supervision of ILO's Director, Decent Work Team for Arab States based in Beirut. The CTA is assisted by two National project officers as well as by administrative support staff.

ILO specialists from the Decent Work Team based in Beirut provide technical guidance and support in coordination with technical units in Geneva.

The project officially started in September 2011; however its implementation started in April 2012 as the project team was recruited. The project ended in April 2014 and got a cost- extension for one year till May 2015.

### **Project funding arrangements**

The project "Strengthening Workers' Organizations in Arab countries through economic, social and legal literacy" had a duration of 24 months and a budget of 2,475,050 USD

### 3. Evaluation background

The purpose of the final independent evaluation was to examine the efficiency, effectiveness, relevance, impact and sustainability of the project. This report reflects the findings from the evaluation on whether the project has achieved its stated objectives, produced the desired outputs, and the extent to which the outcomes have been achieved. It identifies strengths and weaknesses in the project design, strategy and implementation as well as lessons learned, with recommendations for ILO's consideration in designing the second stage. (See Appendix III: Terms of Reference).

The evaluation complies with the ILO evaluation policy and guidelines, which are based on the United Nations Evaluation Norms and Standards, and the UN Evaluation Group ethical guidelines have been followed.

The evaluation covered each component of the project, and its entire duration. The scope of the evaluation included the multiple geographical dimensions of the project, and included fieldwork in Lebanon, Jordan, Oman and Bahrain. The evaluator met workers' organisations, independent experts, and other stakeholders and partners.

The work of the evaluation was organised in three phases:

Desk Phase	<ul style="list-style-type: none"> <li>Collection and desk review of project documentation</li> <li>Review of evaluation questions</li> <li>Preparation of interviews</li> <li>Preparation of Inception Report</li> <li>Meeting with Evaluation Manager (by Skype)</li> </ul>	<p>2-3, 5 March</p> <p>9-10 March</p> <p>13 March</p>
Field Phase	<ul style="list-style-type: none"> <li>Beirut – briefing with Evaluation Manager</li> <li>Beirut Interviews with ROAS staff, field visits to partner organisations and project participants</li> <li>Amman Field visits to partner organisations and project participants</li> <li>Muscat Field visits to partner organisations and project participants</li> <li>Bahrain Field visits to partner organisations and project participants</li> <li>Debrief to Evaluation Manager, project team and ROAS staff</li> </ul>	<p>16 March</p> <p>16-20 March</p> <p>22-23 March</p> <p>24 March</p> <p>25 March</p> <p>2 April</p>
Synthesis & Reporting Phase	<ul style="list-style-type: none"> <li>Data analysis, preparation and submission of draft evaluation report</li> <li>Incorporation of comments and preparation of final evaluation report</li> <li>Submission of final evaluation report</li> </ul>	<p>April - June</p>

The clients of the evaluation include: the ILO Regional Office for Arab States (Beirut, including the overall project manager (CTA), the project team (NOs), the technical backstopping staff (senior workers' specialists), members of the steering committee, the constituents in the target countries, and the donor.

### Evaluation Methodology

The evaluation tools employed were document analysis, identification of relevant evaluation questions and sub-questions, semi-structured interviews to elicit the facts relevant to the evaluation questions and synthesis of findings, conclusions and recommendations in this report. The specific evaluations questions are listed in the attached Inception Report (Appendix IV).

The Evaluation was managed by Mr Torsten Schakel, Senior Labour Standards Specialist, ILO DWT for ROAS, in coordination with Ms Nathalie Bavitch, Monitoring and Evaluation Officer, ROAS.

The evaluation was conducted by Mr. Dave Spooner, External Evaluator, from March 2015 to April 2015.

**Document review:** The evaluator familiarized himself with the project through a review of the relevant English-language documents, including the original and revised project proposals, quarterly progress reports, and the mid-term evaluation report. Other documents were collected during the fieldwork. See Appendix VI for the full list.

ILO Evaluation guidance materials and checklists were also made available to the evaluator. These materials have guided the evaluation as appropriate.

**Field visits** to meet with project partners and stakeholders in Lebanon, Jordan, Oman and Bahrain were organized in accordance with the Terms of Reference of the evaluation and prepared on basis of findings made during the desk review phase. The aim of the field visits was to answer evaluation questions related to the OECD criteria, as well as to assess the beneficiaries and stakeholders perspective, interest, and benefits of the project.

All the evidence, comments and recommendations contained in this report are drawn from the documentation listed in the appendix, or from interviews during the fieldwork process. Interviewee's comments and analyses are not attributed to specific individuals for reasons of confidentiality.

The evaluator was accompanied by Mr Rachid Khedim throughout the fieldwork (with the exception of Bahrain, who refused a visa). Mr Khedim is a former CTA, and an expert on the trade union movement in the region, who provided timely advice and background information.

The evaluator received good cooperation and assistance during the entire process.

The time allocation for the evaluation was limited but allowed to reach out to most stakeholders of which a list had been provided by the project. About 51 interviews could be arranged.

### **Lebanon (16-20 March)**

After having met the project team and ILO ROAS management and staff, interviews were held (through Skype) with ILO Headquarters in Geneva, project partners, ILO coordinators, consultants and other relevant stakeholders in other countries.

In Beirut, the evaluator also met with the Director of the Asfari Institute for Civil Society and Citizenship; the Vice-Secretary of the Domestic Workers Union, the VAL (vehicle inspection service) Workers Union, a private company retail workers union, FENASOL union federation; the CGTL union federation; the Frontiers Ruwad Association; and the ITUC office in Amman.

A debriefing meeting with ROAS took place on 2 April 2015.

### **Jordan (21-23 March)**

In Amman, the evaluator interviewed representatives of SADAQA (workplace childcare NGO), GFJTU, the General Trade Union for Workers in Electricity, Ahmad Awad, the Phenix Centre, and JFITU, including the team who had undergone training of trainers in the project.

### **Oman (23-24 March)**

In Muscat, the evaluator met representatives of the Oman Ministry of Manpower, the Oman Chamber of Commerce and Industry, and the GFOTU, including the team of trainers who had received training in the project.

### **Bahrain (25 March)**

In Bahrain, the evaluator met representatives of GFBTU, the Bahrain National Gas Company Trade Union, and the ASRY Trade Union (shipbuilding and repair yard). In addition, brief phone conversations were held with representatives of the PGFTU and GFYTU.

The full list of interviewees can be found in Appendix VII.

### **Limitations:**

- The time allocation for the evaluation was limited but allowed to reach out to most stakeholders of which a list had been provided by the project. About 51 interviews could be arranged.
- As noted by the mid-term evaluator, there was virtually no English-language data available with regard to developments in membership figures and collected union fees. Such data could have been useful to measure project impact in certain areas over the project duration.
- During the field visits, the evaluator had requested to meet and interview regional representatives of the Global Union Federations, notably those representing ITF, UNI, IndustriALL, BWI and PSI. Unfortunately, arrangements could not be made by the project team in the time available. In the evaluator's view, this was a major missed opportunity to gain perspectives from other major actors in the region from the democratic international trade union movement. It is recognised that some of these representatives do not necessarily share the same analysis, strategy or tactical approach as the project, but nevertheless their interviews could have been a very important addition to the evaluation, particularly in avoiding replication of effort and enhancing sustainability in future interventions.



## 4. Main Findings

### 1.1. Relevance

#### 1.1.1. How does the project approach fit the on-going trends and patterns of workers issues in the selected countries?

The project approach remains highly relevant to the current trends and patterns of workers' issues.

When the project was designed, two important experiences had been observed: Firstly, countries with an active trade union movement, characterized by democracy and independence, even in relative terms, witnessed trade unions being in the forefront of the societal and popular democratic movements that demanded changes. Secondly, and in contrast, countries where the trade union movements were government controlled they helped quell popular uprising.

The greater the deficits in real and genuine participation of workers in trade unions and thus the lack of responsiveness to people's priorities, needs and aspirations, the greater was the need and willingness to create alternative structures and this paved the way for establishing new independent trade unions. However, these new structures were under pressure from the "historic" unreformed trade unions as well as the authorities due to their decreased influence on workers' organizations. In addition, the new embryonic unions were in need of permanent political support from ILO and ITUC and their technical assistance in all areas: internal organization, administration (mainly fees collection), dealings with authorities, capacity building on socio-economic issues, regional and international affiliations, etc.

As the project progressed, it was affected by an increase of direct and indirect government pressure on the reformed 'historic' unions and the new independent unions. At the same time, broader conflicts and crises in the region increased levels of insecurity and fear in workplaces and communities. Most of the unions and federations supported by the project are fragile and vulnerable to pressure from governments, employers or external political and/or religious forces. The difficult challenges facing the unions further strengthened the argument for the project's fundamental approach.

As the group of participating unions consolidated, the project focused on the following in the respective countries:

**Bahrain:** The independent trade union movement (GFBTU) was connected with the massive protests and demands for democracy, and came under enormous pressure from the authorities, which, among other things, laid-off around 4,000 of its members and established a new government-controlled union federation (BLUFF). Assistance to the GBFTU in that difficult situation from the ILO was timely and necessary.

**Jordan:** The independent movement started before the Arab Spring, from 2006 onwards, when seasonal agricultural day-labourers demanding permanent status and protests by port workers in Aqaba, were suppressed in 2009. This was the nucleus of the new independent workers' movement in Jordan, along with some leaders within the trade unions who had been unsuccessfully pushing for reform since the 1990s. The year 2011 propelled the movement forward, forming the Committee for the Creation of Independent Unions in August 2011, leading to the formation of FITUJ in May 2012. FITUJ subsequently has had to develop and survive in a very hostile environment, with frequent pressure from GFJTU and the government.

**Oman:** As a result of negotiations surrounding US Trade Agreements, Oman had amended its labour legislation enabling workers to organise in trade unions. This was further supported by a project that

aimed at promoting FPRW and social dialogue. However, the project came to an end in 2008 and the trade union movement in Oman (GFOTU) was still at a very embryonic stage and needed assistance in nearly all areas related to normal trade union functions.

**Lebanon:** The government-recognised union federation (CGTL) was widely recognised to be incapable of democratic reform. FENASOL, an older federation which had been within the umbrella of CGTL since the early 1970s had been increasingly frustrated at CGTL lack of democracy, and withdrew in 2012. FENASOL, along with the Trade Union Coordinating Committee (public servants, teachers' unions in both public and private schools), needed assistance to strengthen internal democratic procedures, organising skills and support in demanding reform of labour laws. FENASOL also became crucial in supporting the development of a new Domestic Workers Union.

**Occupied Palestinian territories:** The Palestinian trade unions (PGFTU) continued to suffer from permanent restrictions in free movements due to the on-going occupation, conflicts with the Palestinian Authorities on legislation, socio-economic issues (social security schemes, labour law, etc.) and the Authorities' support for rival unions.

**Yemen:** Trade unions in Yemen have a long history; but substantial assistance provided over the years proved to have little impact. The problem was that GFYTU was neither democratic nor independent in the proper sense. It was hoped that the uprisings that swept Yemen in 2011 would also bring changes to the trade union movement. However, the escalation in the security situation has not only threatened the trade union movement but also the existence of the state as whole.

The original project document also envisaged the involvement of **Kuwait, Qatar, Saudi Arabia, and the United Arab Emirates** in project activities. The rationale behind this is that the project should be prepared for the possibility of changes in these countries that would allow for independent trade unions to emerge. This proved to be impossible.

The declared strategy for the project was to promote and support change in the sense that where existing organizations were compromised and not willing to embrace internal democracy, diversity and independence, the project would provide assistance to workers in establishing alternative trade unions. This was a major break with previous international, ILO included, support in the Arab region to unions often too close to governments and/or political parties. Previously, workers' assistance programmes attempted to introduce change by providing training to union leaders in the hope that they in turn would initiate reforms in the unions in a democratic and independent direction. When this failed in most cases, emphasis was placed on mass training of rank-and-file members as well as local branch and affiliate leaders, expecting that change gradually would come from pressure from "below". Again in the vast majority of cases this did not happen. Given the static trade union situation in most of the project countries, the change in strategy by this project, and taking advantage of the Arab Spring, to work with alternative unions was therefore logical and fully justified.

The project was also timely with regard to developments in regional trade union structures. The International Trade Union Confederation, ITUC, was considering to establish a regional structure, the ITUC-Arab Region (ITUC-AR), as a democratic alternative to the International Confederation of Arab Trade Unions, ICATU. Some ICATU affiliates actually opposed the uprisings in the Arab Spring and thus completely lost the opportunity to be part of the new democratic independent movement.

Nevertheless, evaluation interviews revealed remaining disagreements, disputes and contradictory policies between and within national, regional and international trade union organisations (including ITUC and the workers' group in the ILO) on strategies to support trade union development in the region. There are contradictory analyses of the extent to which national union federations are capable of democratic reform or government-controlled and/or corrupt without realistic prospects

of reform; or whether they are truly representative of significant numbers of workers. There is little or no evidence of coordination between trade union and donor organisations supporting a large number of projects to promote and defend democratic trade union development.

1.1.2. How do the project objectives fit under the ILO Decent Work Country Programmes for countries where it exists and broader development frameworks (UNDAF)?

The project objectives are fully aligned with the ILO Global Programme and Budget Outcome 10 “Workers have strong, independent and representative organizations”, as well as DWCPs where they exist.

**Jordan.** Jordan was the first country in the Arab region to sign a DWCP in 2006. The project objectives are aligned with the first priority of the 2012-15 Decent Work Country Programme, that “decent work opportunities for young men and women are expanded through the promotion of better work conditions, non-discrimination and equal rights at work” with the proposed outcome (1.3) of “increased institutional capacity and mechanisms for social dialogue, collective bargaining and policy making”.

**Oman.** The Extension of the Decent Work Country Program (2014-2016) for Oman stressed, under priority 2 (Ensure effectiveness of the social dialogue in compliance with International Labour Standards), the importance of continuing to provide enhanced capacity building to constituents with the aim of strengthening their role in economic and social policy-making. It noted that the project had provided technical advisory services to the GFOTU in preparation for its First Congress which was held in February 2014.

**Occupied Palestinian Territories.** The first priority of the Palestinian Decent Work Programme 2013–2016 is for the promotion of improved labour market governance and labour rights, and one of the two related outcomes specifies the need for strengthened institutional capacity and mechanisms for social dialogue and policy-making, with a particular focus on wages, occupational safety and health, gender equality and discrimination at work.

1.1.3. How do the project objectives respond to donor priorities in the countries targeted?

The project appears to have fitted well with donor priorities at the time of its inception, when it was hoped that developments towards more open and democratic societies could be strengthened by responding to the needs of the workers’ movement.

1.1.4. How did the intervention’s design and implementation contribute (or not) toward the ILO goal of gender equality, international and regional gender equality conventions, and national gender policies and strategies?

The original project proposal integrated gender equality concerns in the programme, including the need for gender-responsive labour statistics. It aimed to achieve gender parity in training, with a focus on young female workers and the inclusion of informal and unorganized workers (mainly women), while ensuring that the persons selected for training have the qualifications to become agents of change. The project design included new approaches for the self-organisation of women (and youth), rather than simply creating women’s committees.

The project invested time and efforts in raising the awareness of some trade unions on the need to train staff on the principles of gender equality and women workers’ rights. Regional and national workshops, including activities organised jointly with the ILO-ROAS Gender Unit, revealed considerable conservative resistance to the inclusion of gender issues in organising, representation

and policy formulation, particularly from some of the ‘historic’ union federations, along with a culture of very limited representation of women in project activity.

While external donor organisations often demand the visible participation of women as a condition of funding, in reality there is only token representation. In some instances women were “instrumentalised” in order to obtain external funding and justify donor grants.

In some of the new (or newly) independent unions however, there are signs that men are increasingly articulate and open-minded about gender equality in new ways, unrelated to the demands of donor organisations, and clear examples of strong and articulate women leaders.

In Bahrain, women are represented on the board of GFBTU, there is a strong women’s committee, and a strong commitment to gender issues. There is a commitment to achieve 30% of board seats occupied by women by 2020. Within the individual unions themselves, women are present on the boards of fifteen unions, and five unions have women as president. In Jordan, with the support of the project (along with FES and the AFL-CIO Solidarity Center), FITUJ’s women membership of unions has increased from 5% to 14% during the project period, and trained women trainers provide training specifically for women union members.

There remains much more to be done in order to ensure a genuine inclusion of women in the strategies, programmes and leadership of unions in the region, and to generate a real commitment of the leadership to gender equality.

## **1.2. Validity**

### 1.2.1. Is the project strategy and structure coherent and logical (what are logical correlations between objective, outcomes, and outputs)?

There is generally a coherent and logical correlation between objectives, outcomes and outputs. The correlation between the original outcomes and outputs and those of the revised proposal for the project extension were not entirely clear.

When agreeing on the project extension, it would have been useful to produce a new consolidated single framework making clear which of the old outcomes and outputs had been changed, supplemented or replaced by those of the revised project.

There was also confusion between outputs and outcomes, and the measurement of results was made more difficult by the lack of indicators for outcomes, rather than outputs, in the logframe and M&E plans.

Given the political nature of the project, the major anticipated outcomes were necessarily very broad, with indicators that are very hard to validate or to demonstrate attribution to the project itself (e.g. “freedom and independence of workers’ organisations”). While the outcomes are ambitious, the indicators furthermore (where they exist) do not help to measure the expected impact.

### 1.2.2. Were project assumptions realistic; Did the project undergo a risk analysis and design readjustment when necessary? - In what ways did the project adjust its strategy based on the recommendations of the midterm evaluation?

When the project was designed and launched, the region appeared to be on the brink of radical change towards more open and democratic societies. However, the original project assumptions were overtaken by political developments beyond the control of the project.

The situation in the region is very difficult to predict, which complicates risk analysis. Nevertheless, it might be possible to develop some potential scenarios for future interventions. Questions arising included the possible stalemate between unions and governments, or between democratic unions and government-controlled unions; the democratic unions agendas, and a possible second wave of protest and unrest.

It became important to learn more about the unorganised workers, sometimes working outside of the existing federations, with a view to integrating the workers into the structures at a later stage, particularly migrant and domestic workers.

The evaluator is not aware of a systematic analysis of risks and assumptions using the ILO's guidelines on risk management. However, it should be borne in mind that in a project of this nature, analysis of political risk is a constant and fast-changing process.

### **1.3. Effectiveness: Project Outcomes and Activities (See Appendix III)**

It should be noted that as a result of the highly political objectives of the project, the team was less in control of the achievement project outcomes.

The primary source of information in assessing outcomes and activities are the Quarterly Progress Reports produced throughout the project, supplemented by reports to the PAC and interviews during fieldwork. It was not always clear how reports of individual activities were organised within the headings of project activities and outputs, particularly after the extension to the project was introduced. Some activities were reported twice, under different headings. This happened when, for example, opportunities were taken to hold meetings with trade union leaders when project staff were facilitating workshops. This is not a criticism of the project's managers, but rather a reflection of the overlap and 'grey areas' between some of the anticipated project outcomes.

The English-language reports of activities seen by the evaluator contain little or no quantitative data. Most activity reports in English give no indication of the numbers of participants. Almost none are disaggregated by gender. The evaluator has had no opportunity to see any of the reports of individual activities (ToT training sessions, thematic workshops, etc.) which may contain more detailed information. This was due to the fact that these reports were prepared in Arabic, and have not been translated.

1.3.1. Has the project achieved the planned objectives? (analysis of achievements and challenges by outcome is required) In cases where challenges were faced, what intermediate results can be reported towards reaching the outcomes?

#### **Immediate Objective 1: Institutional capacity of workers' organisations strengthened**

##### **Assess the needs of workers' organisations (1.1.)**

No general methodology document was produced, but separate needs assessments were conducted and validated in Jordan, Oman, Bahrain, Lebanon, and Yemen. These were primarily undertaken through missions to the countries concerned and meetings with the relevant workers' organisations in each country.

##### **Develop strategies and action plans for workers' organisations (1.2.)**

Action plans with trade unions were developed in all targeted countries. New workers' organisations were established in Jordan and Lebanon; bylaws of workers' organisations in Lebanon and Oman were revised, general assemblies were conducted in Oman, Bahrain and Jordan without external interference.

Workshops designed to discuss “the role of trade unions in light of the (national) socio-economic situation” were held in Jordan, Bahrain, oPt, and Yemen. These were then supplemented or followed by national meetings and workshops to assist the development of each participating union, along with regional events.

**In Jordan**, the project worked to foster an enabling environment for freedom of association and the right to collective bargaining. The initial workshop in July 2012 was an opportunity for representatives of the GFJTU and the newly-formed independent unions to meet. This managed to establish communication between the GFJTU, the "historic" trade union centre, and the independent unions (subsequently represented and organised within FITUJ). Some cooperation was established with regard to a common trade union stand on labour and trade union reforms in conformity with the International Labour Standards, which led to the creation of a common committee, the “National Committee for Reform of the Labour Movement in Jordan”. It met only once.

The GFJTU gradually hardened its stance against FITUJ, and all forms of cooperation ceased. Complaints were made to the ILO about its assistance to the independent trade unions. As a consequence of GFJTU’s refusal to participate in project activities if FITUJ is also able to participate, the majority of activities have been carried out in collaboration with FITUJ. Notably the project supported and assisted FITUJ in establishing itself as a national centre, and in holding the organization's first congress on 26 April 2013, although not recognised by the government.

The project provided essential support for FITUJ over the last three years, during which time they have been able to advance the agenda on labour rights, including through promoting the emergence of public sector unions.

The financial capacity of FITUJ remains weak. Support received from the ILO and the AFL-CIO Solidarity Center does not include financial support towards their day-to-day expenses, and it has proven impossible to collect dues etc while not legally registered. FITUJ currently shares an office with an NGO, and depends on donations from members and supporters to cover rent and other costs.

The ability to generate support through affiliation to international trade union institutions remains hampered by lack of affiliation to the ITUC. FITUJ were not invited to participate in the ATUC Congress in October 2014, nor were they given an opportunity to attend as observers. More recently however, the FES organised a workshop with PSI where both GFJTU and FITUJ were invited to make presentations, which opens possibilities for cooperation with PSI.

Given the hostile environment, further help is needed to defend and consolidate the achievements of the FITUJ and to help the organization further develop internal democracy and build sustainable relationships with international trade union federations.

**In Lebanon**, the project has worked very closely with FENASOL, and affiliated unions. Workshops were provided on a wide range of issues, including union bylaws, migrant workers, women’s empowerment, domestic work and others.

The most important and successful intervention has been the support given to the formation of the Domestic Workers Union, formally launched in January 2015. The project, supporting and building on the previous work of the PROWD project, had supported a sequence of activities including thirteen capacity-building workshops attended by large numbers of domestic workers, which culminated in the founding congress of the union, despite pressure from the authorities.

The membership of the DWU includes women (and men) from many migrant worker communities – from Ethiopia, Sri Lanka, Bangladesh, Togo, Benin, Sudan, Senegal and elsewhere, with very different

languages and cultures. Without the support of the project, it would have been very difficult to successfully integrate them together into a coherent single organisation.

The project also provided long-term and consistent support and mentoring to FENASOL itself and its affiliated unions. It also directly supported the organisational development of some of FENASOL's affiliated workplace unions. Training and support resulted in successful collective bargaining over terms and conditions with employers (examples: school allowances, improved environmental working conditions, and other benefits), improved internal democratic processes, and engagement with rank-and-file members by the union leadership.

However, in other instances the project's attempts to provide support to workplace unions were facing considerable hostility from employers. There are examples of victimisation and physical intimidation leading to the virtual collapse of organising activity. In these cases, the project and FENASOL continue to provide training support and legal advice to the remaining activists.

**In Yemen**, the project provided very useful support in two capacity-building activities, with GFYTU representatives from each of Yemen's 20 governorates along with members of the central committee and executive bureau. Women were among the participants, and gender issues were included in the discussions.

The results were very encouraging. In terms of representativeness, civil servants formed or joined unions (although no numbers are available), despite the legal restrictions. They joined the federation, and were able to undertake collective bargaining. Even before the uprising, many workers effectively ignored the legislation, and new unions were formed in nearly all the government ministries. Before the uprising, trade union activity in the private sector was very limited and existed only in a few large workplaces. After the uprising, this was extended across industry.

Due to the dire security situation in Yemen, the project is not able to operate there at present and for the foreseeable future.

**In the occupied Palestinian territories**, the PGFTU participated in a sequence of three workshops on collective bargaining, held in Nablus, with seventeen trade unionists representing different areas and sectors. Those trained were subsequently successful in signing a new agreement with the federation of contractors in the construction industry, and with a telecommunications company. They also formed a team to undertake mapping and to organise among informal economy workers, particularly domestic workers.

As a result of the project, the PGFTU is also undertaking work to review and improve social protection provision, the minimum wage, and amendments to labour law.

The project also assisted in the amendment of union constitutions to increase the representation of women and youth (including a 30% minimum quota for women in union elected bodies), strengthening internal democracy in advance of the 2016 PGFTU General Conference, and helping to develop a new strategic plan for presentation and adoption at the General Conference.

Given the wide range of PGFTU projects supported by a variety of donor organisations, there are difficulties in attributing outcomes to specific projects activities.

**In Oman**, the project has also been very useful in helping to develop the functioning and internal democracy of GFOTU. The range of committees reporting to the Executive Committee are now chaired by EC members, and provide annual plans of activity and monthly progress reports. The highest authority of GFOTU resides with the Congress, now held every four years, with each union

entitled to two delegates. Nevertheless, GFOTU interviewees confirmed their continuing close relationship with Oman Chamber of Commerce and Industry, and with the government.

**In Bahrain**, the project supported the GFBTU General Conference in September 2012 and a successful series of workshops, despite the government's refusal of visas to ILO project staff. According to the local workplace union representatives, the project activities provided a "very good, ground-breaking" programme over three years. Despite the establishment of rival unions affiliated to BLUFF, unions engaged in the project were able to make substantial collective bargaining gains, become financially far more self-reliant, improve their ability to communicate effectively with their members, and build awareness among the non-members on the value of trade unionism.

Finally, no information was available on submissions by workers' organizations of observations for the ILO supervisory mechanisms.

### **Training capacities of workers' organisations enhanced (1.3.)**

Workers' education capacity has improved through tutor training, particularly in Bahrain, Jordan and Oman, and the education infrastructure necessary for sustained and enlarged programmes is improving, though still requiring further support. See 'Implement a comprehensive training programme (2.2)', below.

### **Capacity of trade unions in organising workers improved (1.4.)**

The establishment of an informal workers' unit in Yemen proved impossible due to broader political crises.

### **Trade unions in the region have a coordinated strategy on priority trade union issues (1.5.)**

The project was very supportive in the preparation of the Founding Congress of the ITUC Arab Region (ATUC), held in October 2014. Background policy documentation was prepared by the project team, and subsequently presented and adopted at the Congress itself. This was an event of significant importance: a democratic alternative and a direct challenge to the International Confederation of Arab Trade Unions (ICATU), which has lost all credibility.

### **Improved institutional structure within workers' organisations to improve the outreach of workers (1.6.)**

*See Appendix III and 'Implement a comprehensive training programme (2.2)', below.*

## **Immediate Objective 2: Technical capacity of workers' organisations strengthened**

### **Provide workers organisations with technical inputs on priority issues (2.1.)**

The technical inputs provided by the project to workers organizations included a substantial number of national and regional workshops and meetings on issues such as social dialogue and collective bargaining, minimum wage policy, decent work for domestic workers, women and youth participation in unions, social protection, labour law reform, and others. In general, these were much appreciated and well-received. The few critical comments were concerned with the level at which the training was delivered (assuming a high level of prior knowledge), and the need for stronger, more enforced, guidelines on the nomination of participants by older "historic" union federations.

On the other hand, thematic literacy briefs and position papers have been produced and shared on minimum wage, macroeconomic policies, financial and economic crisis, social protection, taxation, European-Mediterranean free trade agreements, migrant workers, informal workers, negotiation for



access to non-agricultural markets. Apart from four short translated synopses (financial and economic crisis, the minimum wage, taxation, and macroeconomic policy), none were available in the English language, so it is not possible for the evaluator to comment.

It was clear from interviews that labour law reform remains one of the central issues needing further technical input, and in particular to clarify (and amplify) the interpretation of the Freedom of Association to include the rights of workers to form union organisations of their own choosing, even when this leads to organisational pluralism, whether at national centre, sectoral or enterprise level.

### **Implement a comprehensive training programme (2.2.)**

*Details of all training of trainers' project activities are included in Appendix III: Summary of Project Activities.*

The development of a comprehensive training programme has achieved considerable success in Lebanon, Jordan, Oman and Bahrain, and to a lesser extent in oPt. In all countries, trainers received training in educational methodology and techniques and in some of the key issues. To a lesser or greater extent, the unions now report that they have the capacity to develop and deliver their own training programmes, although the project had no provisions of measurement of the increased capacity in terms of skills and knowledge. The demonstration of increased capacity was through self-reporting, in addition to the products delivered by the participants as a result. A more robust data collection system would have allowed for better measurement of acquired capacities.

The workshops covered training methodology and training techniques, and culminated in the design, preparation and presentation of a training programme by the participants themselves. The approach to education was highly appreciated by participants, the level of training judged to be good, and the ILO trainers very good and supportive. The training concentrated on the learning process, and participants were assumed to have good knowledge of the content (decent work, migrant labour, women workers etc).

At the end of the sequence of training workshops, small groups of trainers were selected from each country to participate in a regional workshop in Beirut, which culminated in testing of training materials and the development of local action plans.

Some trainees already had some training experience, but not previously at this level. Discussion revealed that some, at least, of the more experienced trained trainers found the learning methodology a little -complicated, over-prepared, and too rigid. Those with little or no experience suggested that the project activities were too short, and there should be opportunities for longer properly certified training programmes, perhaps offered at the ITC Turin. Other (less experienced) participants appreciated the methodological training, but felt that they needed further support on some of the key technical issues, especially labour law and working with migrant workers. Nevertheless, these were regarded as potential areas of improvement, rather than criticism of the programme.

The participants very much appreciated the regional workshop, and suggested that the project expand opportunities to exchange experiences with trainers and union leaders from other countries, both within the region and beyond (particularly in the countries of origin for migrant workers in the region).

ILO accreditation and 'branding' of the programme was perceived to be very important by the workers as reassurance that trade union education is within their right.. Trainers suggested that it would be very useful if they could be formally accredited as such by the ILO, and that they are able to present ILO-branded certificates to participants of their workshops. It was noted that workers had

been worried about being associated with trade unions or union activity (for example, to 'like' activity on Facebook), but this changed dramatically with ILO accreditation.

In most cases, the trained trainers were not professional educators, and many were volunteers – running education programmes for the union in their spare time, holidays or during unpaid leave. This is very helpful for the sustainability of the education and training provision at the national level, especially for those unions with a relatively weak infrastructure. It demonstrates that the ToT programme does not raise unrealistic expectations of the establishment of long-term education and programmes reliant on external donor funding.

The trained tutors have subsequently successfully run a number of programmes: on the role of trade unions, union rights, communications, the right to strike, negotiating skills etc, with participants nominated by the unions; and training programmes within enterprise unions, on subjects such as social protection, retirement pay etc. In Bahrain for example, the trained trainers are now delivering 2-day workshops every month, each with 20-25 participants nominated by unions. In addition, they are providing training directly to five enterprise unions. However, the foreseen institutionalization of the trainings by establishment of workers training and education “units” in targeted countries did not materialize.

Despite the good feedback from the trainers themselves, some of the union leaders separately interviewed were concerned that the ILO trainers needed to be more carefully selected to have more familiarity with the specific context and circumstances facing unions in the beneficiary country. They believe that the training had been too general and regional in character, and some of the ideas 'imported' from elsewhere in the region were not appropriate locally – particularly when addressing questions of gender, politics or democracy.

The evaluator did not have the opportunity of interviewing ToT participants in Lebanon or oPt.

### **Establish a Labour Education and Research Network for the Arab Region (2.3.)**

The Network was an ambitious component of the project which would have required more substantial financial and staff resources to achieve, even if the external political context had been favourable. None of the plans were realised beyond the construction of a basic list of resource people. Partner organisations interviewed in the evaluation were unaware of the Network's existence.

### **Workers' organisations are better equipped to participate in policy debates on priority issues (2.4.)**

As mentioned previously, thematic literacy briefs have been produced on minimum wage, macroeconomic policies, financial and economic crisis, social protection, taxation, European-Mediterranean free trade agreements, migrant workers, informal workers, negotiation for access to non-agricultural markets. There is scope for considerable improvement in the dissemination of these materials, although multiple copies were made available to all the project partners, and placed online. It is unknown to the evaluator how the materials were distributed or used within the partner organisations for raising awareness and policy debate. They were not made available to other organisation or to the wider public, and online availability was limited.

### **Knowledge products developed to provide technical support for trade unions (2.5.)**

Training modules were developed, and are available on CD. The national pilot training programme was replaced with a regional training workshop held in Beirut in September 2014. The informal economy study in Yemen was relocated to Lebanon, and is due to be completed shortly.

### **Immediate Objective 3: Supporting workers' organisations in advocacy on fundamental principles and rights at work**

### **Workers organisations are in a better position to advocate for FPRW (3.1.)**

It is not clear whether or not the proposed action plan between civil society organisations and workers' organisations on selected labour issues was produced. A regional meeting of trade unions, civil society organisations and journalists took place (12-13 April, Beirut) to discuss labour migration, however the outcome is not clear. A study on the role of unions in advocating for social protection was also conducted, however the strategy and position on social security and informal economy was not concretized as of yet.

### **Freedom of association and basic workers' rights gain ground in public opinion (3.2.)**

The project produced a good quality short film on Freedom of Association and collective bargaining. The evaluator is not aware of the plans for dissemination and usage, and therefore not able to assess impact.

#### 1.3.2.To what extent did the project build synergies with national initiatives and with other donor-supported projects?

The development of the Domestic Workers Union in Lebanon was built on the achievements of the ILO's project on Promoting Rights of Women Migrant Domestic Workers in Lebanon (PROWD), which had been active for three years in providing support and advice to domestic workers, but was not designed as an organising project. The literacy project provided the necessary support, to form the union.

There was very good synergy with the ILO's Migration and Governance Network project (MAGNET) particularly in two regional policy dialogues held in Kuwait (migrant workers and domestic workers). There were very good contributions from the workers' literacy project, representing workers' perspectives, and arguing for genuine workers' representation. The project's advice and support were also very valuable in the Kathmandu meeting with GEFONT.

MAGNET staff indicated that they had been very impressed with the work undertaken by and with the committee forming the Domestic Workers Union in Lebanon, both at the learning outcomes and the capacity of the women involved. The next phase of the MAGNET project will focus on the construction industry, and the MAGNET team would very much appreciate ACTRAV and the literacy project's support in developing construction sector work.

Media strategy is a major component of MAGNET support to domestic workers and to migrant workers more generally, particularly to improve the quality of media reporting on migrant workers. The literacy project was very supportive in building links between unions, allied NGOs and the media, with a workshop the project staff facilitated in Bahrain, for example. A media workshop with the GFBTU was also being planned to be held in Beirut later in April to discuss media strategy on migration, trafficking and workers' rights.

Overall, the literacy project has played an essential role in ensuring that ILO-ROAS strategy in the region reflects workers interests.

#### 1.3.3.What, if any, alternative strategies would have been more effective in achieving its objectives?

It appears that the project has not engaged the regional representatives of the Global Union Federations, or established regular consultation. It is clearly understood that the ILO's primary points of contact with the trade unions are the national centres and the structures of the ITUC. Nevertheless, there was considerable work undertaken by the project directly with enterprise or sector unions, and two of the national centres (GFBTU and PGFTU) are directly affiliated to GUFs.

More importantly, assuming agreement that sustainability is vital and that the democratic and independent trade union movement is fragile and vulnerable, membership of the GUFs could be crucial, particularly in offering long-term solidarity and support in collective bargaining with the employers or in disputes, access to sector-specific training for organisers, and building networks of contacts with other sector unions in the region, and internationally.

There are already GUF affiliated unions in each of the participating countries, with the exception of Oman (**see Appendix IV**). This is particularly important in the case of BWI, given the importance of the migrant construction workers and BWI's experience and expertise, and the IUF, of which the International Domestic Workers Federation is part.

Unions participating in the project are keenly interested in developing international contact with their respective GUFs with jurisdiction over their specific sectors, and some have already done so.

The project might have considered holding regular consultation meetings with regional representatives of the main GUFs, inviting them to participate or observe at regional events, and facilitating links with enterprise or sector unions as appropriate.

#### 1.3.4. How well did the project respond to the midterm evaluation recommendations?

Mid-term evaluation recommendations	Independent Evaluators Comments
1) The project should concentrate human and financial resources on consolidating and further develop what have been achieved so far. Taking on board possible new tasks should be considered only if it does not impede this.	The project did concentrate on consolidation of achievements, and no new tasks were initiated.
2) The project should continue to concentrate activities with trade unions that embrace internal democracy, diversity and independence, both existing and alternative ones, and at the same time pay close attention and be prepared to assist "historic" unions that show signs of desire to reform.	The project did concentrate on activities with unions embracing democracy. The project continued to pay attention to the possibilities of the "historic" unions showing signs of reform, although no new major opportunities arose.
3) Special attention should be given to the trade unions in Oman. The union movement is still at a nascent stage and assistance will be needed to strengthen organizational consolidation and capacity building. This will further the chances for a democratic and independent development.	Considerable further assistance was given to the GFOTU, primarily through a sequence of training workshops on key issues.  Nevertheless, there is continued debate and discussion whether real trade union democratic reforms are possible or impossible under the current political context.

<p>4) The new ITUC-Arab Region regional trade union structure is still under construction and the project can assist by close collaboration in certain activity areas as well as in supporting democratic and independent affiliates as well as potential affiliates.</p>	<p>The project worked in close collaboration with ITUC and leading affiliates in supporting the founding congress of ATUC, and continued to support the democratic affiliates and potential affiliates, both through project funds and regular ACTRAV budgets. This was somewhat compromised by the refusal to enable FITUJ to affiliate to or participate in ATUC, and the appointment of GFJTU to the ILO Governing Body.</p>
<p>5) Given the security situation in Yemen as well as the internal instability in the General Federation of Yemeni Trade Unions, GFYTU, activities in that country should be on a limited scale with the possibility to expand should the situation change.</p>	<p>The situation in Yemen deteriorated further, and there has been no further project activity.</p>
<p>6) The project should as soon as possible activate the trained trainers and assist in establishing workers' education structures within the unions with a view to launch substantive national training programmes.</p>	<p>The project achieved substantial progress, particularly in the development of teams of trainers in Oman, Jordan and Bahrain, and provision of national training events. There remains more to do in developing infrastructures capable of sustaining long-term education programmes without further external support.</p>
<p>7) Building upon already acquired experiences the project should continue to assist trade unions in approaching unorganized groups such as migrants, domestic and informal sector workers. Where traditional organizing is not possible, often due to legislative restrictions, alternative ways should be sought. This could also be applicable to for example public workers which in many countries are not allowed to organize in traditional ways. Using NGOs and civil society contacts to reach out to groups that trade unions are normally not very familiar with is often useful.</p>	<p>The project continued to assist unions to work closely with migrant and informal economy workers, particularly domestic workers, and encouraged unions to build cooperation with civil society organisations.</p>

8) Systematic efforts to improve women and young workers' participation in project activities should be stepped up. This will require specific activities for unions in assisting them in increasing the percentage of women and young members and parallel to that urge unions to ensure fair participation of the two groups in all union and project activities.	The project continued to encourage unions to improve the participation of women and young people in trade union activities, and improve the proportion of women and young workers in union membership.
9) For purposes of targeted and adapted project activities and for better monitoring, systematic data collection and use should take place both within the project and from the unions in general. This would include development in membership figures and union fee collection. In addition, there should be precise registration of resource persons and their competences and profiles of participants in training activities.	It is difficult for the evaluator to assess the extent to which the project has succeeded in the internal systematic collection and use of data, largely because of the few documents that have been translated into English, but problems in documentation appear to remain.  There has been little apparent change in the collection and management of membership data by the trade unions, but given the short period of time, and contexts in which the unions are working, this is unsurprising.
10) It is recommended that a precise plan for distribution of project studies and briefs should be developed as well as making the materials available for a wider audience, for example making them easily accessible on-line.	As far as the evaluator can understand, there has been no development of a dissemination plan, and the provision of on-line materials is very limited, and not easily located.
11) As mentioned in the report, it is unlikely that, even after the 12 month project extension, and notwithstanding the undeniable progress made by the project, that many of the achievements are sustainable. Although the outcomes of increased national training activities in the final project phase will contribute to sustainability, there is no doubt that continued assistance to the unions in the region will be necessary. Therefore, considerations should already at this stage be given to a new project that builds on the achievements of this one.	This remains completely true, and steps have been taken to renew the project or initiate a new phase.
Mid-term Evaluation Recommendations contained in the Monitoring & Evaluation Matrix.	Independent Evaluators Comments
1.2. Develop strategies and action plans for workers' organisations:	

<ul style="list-style-type: none"><li>• Publishing of annual progress reports and budgets of four workers’ organisations</li></ul>	The urgent need to concentrate on defending independent unions from pressure and consolidate gains became of greater priority than helping them produce annual reports, budgets and internal documentation.
<ul style="list-style-type: none"><li>• Assisting union leaders in producing relevant documentation for decision-making bodies and the membership in general</li></ul>	
2.1. Provide workers’ organisations with technical inputs on priority issues:	
<ul style="list-style-type: none"><li>• Develop a precise distribution plan and make the materials extensively accessible on-line</li></ul>	There was no dissemination plan, and on-line access achieved to only a very limited extent.
<ul style="list-style-type: none"><li>• Partner organisations in Oman, Lebanon and Jordan to be assisted in finalising position papers</li></ul>	National studies were completed for Yemen (socio-economic report), Bahrain (labour law review and socio-economic report) and Jordan (labour law review).
2.2 Implement a comprehensive training programme	
<ul style="list-style-type: none"><li>• Training of trainers should continue</li></ul>	The ToT programme continued and proved very successful in building trained teams of trainers in Oman, Jordan and Bahrain, with substantial local/ national training undertaken or being planned by the teams in each country.
<ul style="list-style-type: none"><li>• National structured and levelled training should be the main activity for the remainder of the project</li></ul>	
2.3. Establish a Labour Education & Research Network for the Arab Region	
<ul style="list-style-type: none"><li>• Forge links at local level</li></ul>	The Network was an ambitious component of the project which would have required more substantial financial and staff resources to achieve, even if the external political context had been favourable.
<ul style="list-style-type: none"><li>• Ensure at least one resource person on each of the important topics</li></ul>	
<ul style="list-style-type: none"><li>• More detailed list of resource persons to include details of competencies</li></ul>	None of the plans were realised beyond the construction of a basic list of resource people.
<ul style="list-style-type: none"><li>• To verify, question the project’s partner organisations, rather than network meeting participants</li></ul>	Partner organisations interviewed in the evaluation were unaware of the Network’s existence.

1.3.5. Does the project make use of monitoring and evaluation framework? Were data collection and monitoring used as per the recommendations of the mid-term review?

The project did make use of the monitoring and evaluation frameworks (the original project proposal and the subsequent proposal for extension). Nevertheless, these were of limited value due to confusion between activities, outputs, outcomes and indicators within both M&E frameworks, and inconsistencies between them. Indicators allow assessment in terms of activities and outputs

(e.g. number of trainings held, number of trained people, etc); they however are limited in terms of measuring technical aspects and do not help measure the expected impact.

Furthermore, data collection on union membership and on indicators in the M&E plans was very limited.

#### **1.4. Effectiveness of management arrangements**

##### **1.4.1. Were the management arrangements effective?**

The original decentralised model of national officers working in each country was not successful. The appointed officers became submerged by organisational administrative work and mediation between the Beirut team and their respective federations. There was insufficient competence and capacity – not just with the leadership of the federations, but also at the base – and the national project officers were in effect captured by bureaucracy.

It was noticeable that the core project team in Beirut were currently all male, which does not provide a good example in relation to the objectives of increasing participation and leadership of women.

The relationship between the project and other ILO projects operating in the region, notably PROWD and MAGNET seemed good, and should be maintained.

It is not clear whether the Advisory Committee had a significant role in helping to steer the project forward, and whether its composition was the most effective in providing good quality advice.

There was no opportunity to assess in depth the effectiveness of the project team structure and general management arrangements, but interviews with the staff concerned gave no indication of any major concerns.

##### **1.4.2. Has the project received adequate technical and administrative support from the ILO departments and units?**

Interviews with project staff suggest that the project received considerable support from ACTRAV and MIGRANT.

#### **1.5. Efficiency**

##### **1.5.1. To what extent have project activities been cost-effective?**

It was not possible to determine whether the activities were cost effective, as there were no available financial reports disaggregated by activity in English, although the ROAS office gave assurances that the data is available on the financial systems.

It was noted that the modest levels of financial assistance made available to workers' organisations participating in project activities were wholly appropriate to avoid problems of internal governance and management, or to contribute to problems of financial unsustainability.

##### **1.5.2. To what extent has the project been able to build on other ILO or national/regional initiatives and create synergies in cost-sharing?**



The project was imaginative and innovative in working closely with other ILO initiatives, which enabled cost-sharing in a substantial number of events and activities. This included cooperation with ILO-ACTRAV, ILO-COOP, ILO-MIGRANT, the ILO-ROAS Gender Unit, ITC (Turin), and the PROWD and MAGNET projects.

## **1.6. Impact orientation**

### **1.6.1. What is the likely contribution of the project initiatives, including the innovative approaches and methodologies piloted, to the stated development objectives?**

All the interviews with representatives of beneficiary workers' organisations in the region suggest that the project had a significant positive impact on the capacity of their organisations to defend workers' rights and promote their interests, despite some major shifts and reversals in the political context and, to a varying extent, from country to country.

However, there is no system in place to measure the impact of the project at the end. In fact, even when indicators are reached, they do not allow for measurement of results, and how they impact on the development objective is not established.

What could be noted is that training and support resulted in strengthened governance of the organizations (through amendment of constitutions), as well as the practice in some cases of successful collective bargaining over terms and conditions with employers. Furthermore, workers organizations implemented training programmes as a result of the TOTs received. Results however were less tangible when it came to capacity in policy debates, advocacy, FPRW, and labour law reforms.

It can be noted on the project strategy that, despite problems of external interference, weak democratic governance of trade union structures, restrictive labour laws and absence of many other elements of FPRW, which had been prevalent in the region for decades, the project attempted to address these problems and introduce reform in a relatively very short space of time.

## **1.7. Sustainability**

### **1.7.1. Are project achieved results likely to be sustainable?**

Sustainability is a major concern for the results of the project. The trade unions supported in the project remain fragile and weak, and without further support, they may be highly vulnerable to hostile intervention or pressure.

Little or no attention was given to ensuring linkages and support from the relevant Global Union Federations at a sector level, capable of providing long-term support after the end of the project or other supportive ILO intervention.

The establishment of the ATUC is a step forward towards sustaining the achievements and breakthroughs in supporting the independent and democratic trade union movement. Nevertheless, the ATUC still needs to take more actions and measures in terms of internal democracy, structures, trade union action, etc. in order to completely break away from the old trade union practices embodied by ICATU.

Nevertheless, the design and management of the project has ensured that the project beneficiary unions are not financially dependent on the ILO for survival, and there are healthy indications of a

voluntary culture and, in some cases, recognition of the value of freedom from financial dependency on donors.

For the project to close at this point could be a major challenge for the democratic and independent unions in the region. It is essential that there is a second phase of the project, with organisational sustainability and resilience as the highest priority.

1.7.2. What measures have been considered to ensure that the key components of the project are sustainable beyond the life of the project?

Concern for sustainability has been a core factor throughout the project, particularly concerning the future sustainability of the democratic and independent unions supported through project activities. This has included the development of the training capacity of the unions to deliver programme beyond the life of the project; financial sustainability through improved collection and management of union dues; political sustainability through labour law reform to enable legal registration and recognition of democratic unions; and the sustainability of collective bargaining and participation in tripartite negotiations through improved economic and legal literacy.

The unions are however still at an early stage of development, and require further support to reach full sustainability, as recognised by the project team and the mid-term evaluation, and a continuation of the work of the project is therefore vital for a further period.

1.7.3. How will activities and/or management structures be financed when the project ends?

The unions themselves have taken some initial steps to develop a level of financial and managerial self-sufficiency, although this requires further support. In addition some of the organisations are receiving project support from other agencies and donor organisations.

A continuation project by the ILO is recommended and currently being designed. It is not yet clear how this will be financed.

## 5. Conclusions

### **The continuation of the project is an urgent and essential priority.**

The gains made and the expectations raised in the Arab Spring have been reversed in many Arab countries. Workers and democratic unions in the region face restrictions, threats, the denial of rights and the closing of democratic space, as governments polarise political and human rights issues as a choice between authoritarianism or terrorism.

The project, initially designed during the period of great energy and confidence in the changes sweeping through the region, has had to adapt to these new circumstances. The project activities have been necessarily restricted to five countries: Lebanon, Bahrain, Jordan, Oman and the occupied Palestinian territories. Even in these countries, the democratic and independent unions and federations face a permutation of very difficult conditions. In addition, several of the countries are attempting to deal with large migrations of refugees and the effects of conflict and security concerns.

Nevertheless, the project has had a significant impact. Firstly, it has helped change the trade union culture in the region, and pushed the issues of trade union rights and democracy to the forefront.

Secondly, it has helped build the technical capacity of democratic union forces, through training of trainers, publication of policy briefs, and the development of new trade union policies.

The project has been very important to help activists overcome their fear that training and advocacy for workers' rights was an illegal activity: and to make clear that international rights are also their own rights.

Most importantly, there are dangers of irresponsibility in providing political and practical support to the development of independent unions, only to leave them vulnerable and without protection; of raising expectations then backing away for lack of further funding or fear of political controversy.

### **Policy Dialogue and Strategic Coordination**

The problems are exacerbated by internal disputes and contradictory policies between and within national, regional and international trade union organisations (including the workers' group in the ILO) on a range of issues, and there is little or no sign of coordination between trade union and donor organisations supporting a large number of projects to promote and defend democratic trade union development.

There are contradictory analyses of the extent to which national union federations are capable of democratic reform or government-controlled and/or corrupt without realistic prospects of reform; or whether they are truly representative of significant numbers of workers.

Similarly, there is no consensus on a strategy for support of democratic unionism in the region.

The establishment of the ATUC is welcomed, but needs to be further consolidated in order to firmly move forward towards developing structures, internal democracy and further advancement of the independent trade union movement. In doing so, the ATUC will be on the path to fully break away from the old culture and introduce real change in the regional trade union movement.

The lack of engagement of the GUFs in the project is to be regretted, and could be of major importance in improving the long-term sustainability and resilience of unions in the region if

included in the second phase. Nevertheless, it is of course understood that there may be differences in approach and political constraints between the project's strategy and that of some of the GUFs.

These substantial political issues and questions lie at the heart of the project, and it will not be possible to solve them in the short-term. Nevertheless, the ILO, and more particularly ACTRAV, does hold a unique status which should be used to at least provide a forum for debate, discussion, and clarification of the issues. Future interventions should include exploration of means whereby ILO-ROAS can facilitate this.

This should include a thorough discussion on the criteria that trade union federations (national, sectoral, regional, international) should use when assessing whether or not a workers' organisation is to be admitted into membership. Obviously the problem is not unique to the Arab region, and so the discussion should include the views of independent and democratic unions in other world regions facing the same challenges.

### **Visibility and Communications**

Dissemination and circulation of project materials and experiences have been poor, and overall the project has little visibility, at least in the English language.

It is appreciated that some of the project's activities may be politically sensitive and not suitable for publicity, especially if it threatens the security of the trade unions concerned. But many of the messages and themes of the project deserve a far wider audience among the workers and unions in the region, as well as the broader international trade union, human rights and development communities.

Future interventions should include consideration and exploration of how to achieve this most effectively. This should include an assessment of the feasibility of **out-sourcing** the dissemination, information networking and social media functions of the project to an experienced independent NGO or academic partner.

Similarly, the project should explore the feasibility of supporting the development of an independent regional trade union resource centre for the region, financed independently from donor funds, providing research, publications, information, training of trainers, seminar programmes etc – a regional incubator of democratic trade unionism.

Democratic unions in the region could gain considerable benefit from greater awareness and understanding of trade union development and the struggle for labour rights in other regions – particularly North Africa and South-East Asia - and their own experiences and issues deserve to be shared on a wider international stage. This requires the introduction of a budget specifically for the **translation** of project material in (at least) English, and the translation of materials from outside the region into Arabic (e.g. policy briefs, union capacity-building training material, case studies of trade union internal governance reform). This would particularly benefit organising initiatives among migrant workers. More generally, it would greatly assist unions in the region to build solidarity support and alliances within the international trade union movement.

In place of the originally planned 'Labour Education & Research Network', a further phase of the project should consider producing a resource guide for the democratic trade union movement in the region, giving links and details of global sources of information, analysis, educational materials, expert advice and support on a range of issues, available both online and in print. Such a guide would enable unions to form their own networks of specialist organisations, individual experts etc, appropriate to their specific sector, employer and national context.

### **Attribution and Duplication**

There is a problem of attribution. Interviews in all four countries revealed trade union projects supported by a large number of external donors, international NGOs and agencies, and/or the international trade union federations. This is of course to be welcomed, but it does make it more difficult to be confident that the political or more general outcomes (raised awareness, for example) are the result of the literacy project, rather than other initiatives or a combination of both. There are also dangers of duplication of effort, working at cross-purposes, or even causing conflict. There is a need to develop and maintain communication and dialogue with and between these different agencies, help develop partnership in some project elements, potential synergies and cost-sharing, avoidance of duplication, greater clarity in attribution, and reduction in the risk of conflictual initiatives.

### **Financial Sustainability**

There is an urgent need to address the trade unions' need for financial sustainability through the payment, collection and recording of dues, which requires far better collection and recording of data on membership, union density, etc, along with greater transparency on the sources of trade union income at all levels (local enterprise up to international organisation).

There are two elements to this. Firstly, the need for education activity among leaders and activists to discuss the relationship between independence from governments and employers and financial sustainability. There is a widely-held and deep-rooted assumption, even among leaders of democratic unions in the region, that government financial support for trade unions is desirable and necessary. The project should do more to challenge this.

The second element, where needed, should be technical support in the development of financial administration, record-keeping, transparent reporting and democratic accountability, in enterprise unions, sector unions and in the federations themselves.

The mid-term evaluation report contained specific recommendations to ensure the publication of annual progress reports and budgets by unions, and to assist union leaders in producing relevant documentation for decision-making bodies and the membership in general. This proved impossible due to the urgent need to concentrate on defending independent unions from external pressure and consolidate gains, which became the greater priority.

The field-work interviews revealed that most of the union organisations participating in the project would need considerable technical assistance and support in establishing simple and easily-maintained systems capable of generating the financial information required, as well as establishing basic financial rules and procedures to ensure democratic oversight. In some organisations, assistance is also required to overcome an ingrained culture of opaque financial management.

### **Economic Literacy**

As the original project design appreciated, unions need to be economically literate if they are to be effective in collective bargaining, or have the capacity to contribute to or intervene in debate and negotiations with tripartite counterparts.

The project should continue to address the need for training in basic economic literacy, but pay more attention to the conversion of policy documents into accessible 'popular' workers' education materials in print and social media and to ensure broad and more efficient dissemination and distribution.

### **Education & Training support**

The ToT programme and the workshops providing technical inputs on priority issues successfully provided the backbone of the project, and were delivered to a high professional standard. The ToT programme has been particularly successful.

Future interventions should consider more focused training support and resources on specific priority issues, particularly in support of **organising**, targeting workers in greatest need and under-represented in the trade union movement: migrant and informal economy workers.

The project should also address the long-term sustainability of education and training provision for democratic unions in the region. This is best served, as the project has recognised, in ToT and the creation of sustainable education resources (trained tutors, materials, management structures and skills etc) within the unions and federations themselves. This now needs further consolidation and encouragement, building on the enthusiasm and commitment of the trained tutors. This could include:

- Regular regional trainers' meetings and seminars, and further training and support.
- Exchanges of experience between trainers, and explore the viability of establishing mentor relationships between the less and more experienced trainers in the region. This could take the form of a sequence of exchange visits.
- An assessment of the practical steps required in each participating federation to establish a fully functioning education department and permanent programme of courses
- Encouragement to trainers to participate in the regional and international tutor training programmes and education conferences of the appropriate GUFs, ITUC, and related international organisations

It should be recognised that when training is provided under the auspices of an ILO project, the workers have to trust that they will be protected from victimisation or punishment. If fear is reduced, more will be willing to participate. A second phase should explore how the project could devolve authority to accredited trainers to provide ILO-branded certificates to local/national course participants.

Where appropriate, provide assistance to enable trainers to undertake Global Labour University (GLU) Masters programmes<sup>1</sup> and consider working with the GLU to provide more advanced education for potential leaders and trainers from the region.

### **Visibility and empowerment of women**

Although progress has been achieved, there is still much to do to strengthen the visibility of women in the project. The second phase of the project should consider:

- Including a woman as a member of the Beirut-based project team, preferably with a democratic trade union or labour rights background, and with the skills and experience to lead and facilitate workshops and other meetings.
- Creating opportunities for women activists in participating unions to meet, think and talk: to encourage more direct sharing of experiences, within and between countries.
- Insisting on a minimum proportion of women to be included in all project events and activities
- Providing examples and case-studies of successful organisation and representation of women workers from other world regions, translated into Arabic, and vice versa.
- Better data and analysis on membership and representation of women in the workforce and in unions in the region, the impact of Arab Spring uprisings, and subsequent developments.

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<sup>1</sup> the Global Labour University is a partnership between the ILO, the national and international trade union movement, and partner universities in Germany, Brazil, India, South Africa and the USA

- Encouraging women activists to participate in the regional and international educational programmes, meetings and conferences of the appropriate GUFs, ITUC and associated international organisations, including (but not limited to) the activities of the women's departments and committees.
- More education for union leaders on the underlying reasons for the low participation of women (especially around violence against women, the lack of labour law provision on sexual harassment at the workplace etc).

## 6. Lessons learned and emerging good practices

### Lessons Learned

- Projects that seek to strengthen workers' organisations free from legal constraints or external interference should ensure that the support is sustained and rigorously defended if external pressure persists in opposition to FPRW. Project design should take into account the possible need for continued supportive intervention beyond the time-frame of the project itself, whether for newly formed or reformed older trade union structures.
- The need to provide support for workers' organisations free from legal constraints or external interference is not limited to any one world region alone. Although each region has its own characteristics, projects supporting the capacity of workers' organisations should include the use of examples of successful (and unsuccessful) methods and experiences from other world regions, and should facilitate and encourage inter-regional dialogue between workers' organisations.
- There are major differences in policy, approach and strategy held between different institutions of the international democratic trade union movement in the promotion of FPRW in the region. Efforts to strengthen the capacity of workers' organisations are hampered by lack of coordination and, in some cases, contradictory actions by trade union institutions and partner agencies. The ILO has unique status and authority to provide an open space for constructive dialogue and consultation, and seek consensus wherever possible in support of democratic trade union development.
- The dissemination of project materials is an essential means of multiplying the impact of the project and maximising the number of beneficiaries. Project design should include the conversion of technical material into popular workers' education resources, using mass media, social media as well as traditional print and online publications. Project design should also include the translation of materials into other languages, for dissemination outside the region, where appropriate.
- Projects designed to increase the capacity of workers organisations in promoting and defending FPRW need to recognise the important role of and engage with sectoral unions, national sectoral federations, and the Global Union Federations in providing sustained and long-term support to trade union development, alongside the national centres and their international federation structures. See Appendix IV.

### Emerging good practices

- A careful and sensitive approach towards financial support for fragile, precarious or nascent workers' organisations, which did not endanger their long term sustainability through the development of financial dependency on external donors.
- High quality training of trainers provision, based on robust pedagogical methodology. This led to the establishment of teams of trained volunteer trainers, able to deliver substantial local and national training events for members and activists with very little further support or assistance. This provides a good basis of a sustainable trade union education and training programme appropriate for unions with limited resources. It is an objective frequently proposed in capacity-building projects, but rarely achieved.



## 7. Recommendations

1	The ILO should consider the continuation of the project in an amended form, or the development of the work in a new project, as an essential priority to ensure sustainability	Addressed to ILO – High priority – Substantial financial resources required
2	Focus support towards democratic and independent unions in those countries where progress is possible	<p>Closely monitor developments in the union federations in other countries in the region, and extend support when and where there are serious indications or commitments to democratic reform; consider extending the project to include North Africa.</p> <p>Strengthen support for the development of democratic national sector unions and/or sector federations in the region and, where possible, engage regional representatives of Global Union Federations in the project.</p> <p>Concentrate resources on the development of organising skills by and for migrant, informal, and precarious workers</p> <p>Addressed to ILO – High priority – Substantial financial resources required</p>
3	Promote, develop and implement a program that aims at reforming ‘historic’ unions and their relationships with governments	<p>Assist the review of constitutions, bylaws and structures with the objective of improving their internal democratic functioning, to enable them increase their membership and consolidate their independence.</p> <p>Continue to vigorously promote and defend FPRW with governments, and support union demands for reform of labour law.</p> <p>Addressed to ILO – Medium priority – Limited financial resources required</p>
4	Facilitate regular discussion on strategy and policy in support of democratic trade union development in the region	<p>Reduce the danger of replication or contradictory strategies between the ITUC, the GUFs, and other significant supporting organisations, including donor organisations.</p> <p>Consider means to encourage and facilitate open policy dialogue, such as a sequence of well-prepared seminars and conferences, bilingual (English/Arabic) publications.</p> <p>Addressed to ILO and partner organisations – High priority – Limited financial resources required</p>
5	Focus capacity-building on organising skills and sustainability	Focus training and education provision on organising skills, particularly among migrant, informal workers, and sectors employing large numbers of women workers.

		<p>Explore options for long-term and sustainable provision of independent trade union education and training support in the region.</p> <p>Encourage more exchange of experience between trainers / organisers, and explore the viability of establishing mentor relationships between trainers in the region.</p> <p>Support unions to develop financial sustainability through the collection, administration, recording and reporting of membership dues, and remove dependency on government funding.</p> <p>Addressed to ILO – High priority – Substantial financial resources required</p> <p>A more robust data collection system would have allowed for better measurement of acquired capacities.</p>
6	Continue to strengthen the participation of women	<p>Continue to strengthen the participation of women in project activities, the proportion of women in trade union membership and leadership, and ensure the inclusion of at least one woman on the core project team in Beirut</p> <p>Addressed to ILO – High priority – Limited financial resources required</p>
7	Establish a coherent dissemination plan	<p>Develop a budget specifically for translation of project material in (at least) English; translation of materials from outside the region into Arabic, including case-studies of successful transitions to democratic and independent trade union organisation from other world regions.</p> <p>Out-source the dissemination and information networking functions of the project to a trusted NGO or academic partner, capable of producing material in a popular and accessible style.</p> <p>Replace the original proposal for a regional Labour Education &amp; Research Network with an online and print resource guide for trade union activists in the region.</p> <p>Addressed to ILO – High priority – additional financial resources required</p>
8	Improve project design to strengthen the monitoring and evaluation of outcomes	<p>Project designers need to become better familiar with ILO design and RBM guidelines and available tools, and assisted to clearly distinguish between outputs and outcomes in the project design, and to maximise the possibilities of providing measurements of outcomes.</p> <p>Develop results-based frameworks in designing upcoming</p>

		<p>projects, which would allow to measure results.</p> <p>Establish clear monitoring and data collection mechanisms and make reports available in English for monitoring and knowledge sharing purposes.</p> <p>Addressed to ILO – High priority – Limited financial resources required.</p>
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## Appendix I: Lessons Learned

### ILO Emerging Lesson Learned Template

**Evaluation Title:**

Strengthening of Workers' Organisations in the Arab Countries through Economic, Social and Legal Literacy

**Project**

TC/SYMBOL:

RAB/11/02/USA

**Name of Evaluator:** Dave Spooner

**Date:**

May 2015

The following Lesson Learned has been identified during the course of the evaluation. Further text can be found in the full evaluation report.

LL Element	Text
<b>Brief summary of lesson learned (link to project goal or specific deliverable)</b>	Projects that seek to strengthen workers' organisations free from legal constraints or external interference should ensure that the support is sustained and rigorously defended if external pressure persists in opposition to FPRW. <b>Project design should take into account the possible need for continued supportive intervention beyond the time-frame of the project itself, whether for newly formed or reformed older trade union structures.</b>
<b>Context and any related preconditions</b>	The intervention was (and remains) very timely and necessary to assert the ILO's credibility in upholding FPRW in the region. Having done so, the ILO now has a major responsibility to continue support for the unions undergoing processes of internal reform and the newly-established independent unions. The ILO should continue to exercise its authority to ensure that governments reform their labour laws in accordance with FPRW.
<b>Targeted users / Beneficiaries</b>	Workers and leaders of democratic trade unions.
<b>Challenges /negative lessons - Causal factors</b>	Without continued support, fragile unions or unions facing strong hostile external pressures could be vulnerable to major constraint or closure, with leaders at risk of discrimination or victimisation. Failure to provide ongoing support places the ILO in danger of reputational risk and loss of credibility.
<b>Success / Positive Issues - Causal factors</b>	The visible support of the ILO in promoting and defending FPRW in the region gives considerable encouragement to workers seeking to establish democratic unions free from external interference.
<b>ILO administrative issues (staff, resources, design, implementation)</b>	Urgent need to identify further resources in support of democratic unions free from external interference.
<b>Other relevant comments</b>	None

## ILO Emerging Lesson Learned Template

### Evaluation Title:

Strengthening of Workers' Organisations in the Arab Countries through Economic, Social and Legal Literacy

### Project

TC/SYMBOL:

RAB/11/02/USA

Name of Evaluator: Dave Spooner

Date:

May 2015

The following Lesson Learned has been identified during the course of the evaluation. Further text can be found in the full evaluation report.

LL Element	Text
<b>Brief summary of lesson learned (link to project goal or specific deliverable)</b>	The need to provide support for workers' organisations free from legal constraints or external interference is not limited to any one world region alone. Although each region has its own characteristics, projects supporting the capacity of workers' organisations should <b>include the use of examples of successful (and unsuccessful) methods and experiences from other world regions, and should facilitate and encourage inter-regional dialogue between workers' organisations.</b>
<b>Context and any related preconditions</b>	The Arab region is not the only world region in which workers struggle to assert their rights as expressed in FPRW. The ILO has an important role in facilitating dissemination and discussion of experiences and lessons learned in other world regions, and vice versa.
<b>Targeted users / Beneficiaries</b>	Workers and leaders of democratic trade unions.
<b>Challenges /negative lessons - Causal factors</b>	Overcoming linguistic, cultural and political differences between workers' organisations in different world regions.
<b>Success / Positive Issues - Causal factors</b>	Recognition that the problems and challenges faced by workers in the Arab region are not unique to the region.
<b>ILO administrative issues (staff, resources, design, implementation)</b>	Identifying and allocating sufficient resources for translation, interpretation and publication of materials within the project's dissemination and communication plans.
<b>Other relevant comments</b>	

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The following Lesson Learned has been identified during the course of the evaluation. Further text can be found in the full evaluation report.

LL Element	Text
<b>Brief summary of lesson learned (link to project goal or specific deliverable)</b>	There are major differences in policy, approach and strategy held between different institutions of the international democratic trade union movement in the promotion of FPRW in the region. <b>Efforts to strengthen the capacity of workers' organisations are hampered by lack of coordination and, in some cases, contradictory actions by trade union institutions and partner agencies.</b> The ILO has unique status and authority to provide an open space for constructive dialogue and consultation, and seek consensus wherever possible in support of democratic trade union development.
<b>Context and any related preconditions</b>	Defence of workers' rights in the region is in danger of being compromised by differences in strategy and policy. This will not be solved in the short-term, and the ILO is not in a position to force organisations to reconcile their differences. Nevertheless, opportunities should be identified to minimise the dangers of contradiction or duplication of effort in interventions supporting FPRW.
<b>Targeted users / Beneficiaries</b>	International trade union federations, supportive donor organisations, ILO staff and representatives
<b>Challenges /negative lessons - Causal factors</b>	Difficulties in overcoming deep-rooted differences in policy between and within international organisations.
<b>Success / Positive Issues - Causal factors</b>	The opportunity for the ILO to strengthen its reputation in consensus building towards a common strategy in promoting FPRW
<b>ILO administrative issues (staff, resources, design, implementation)</b>	The need to include a strand of activity promoting policy dialogue within project design.
<b>Other relevant comments</b>	

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The following Lesson Learned has been identified during the course of the evaluation. Further text can be found in the full evaluation report.

LL Element	Text
<b>Brief summary of lesson learned (link to project goal or specific deliverable)</b>	The dissemination of project materials is an essential means of multiplying the impact of the project and maximising the number of beneficiaries. <b>Project design should include the conversion of technical material into popular workers' education resources, using mass media, social media as well as traditional print and online publications.</b> Project design should also include the translation of materials into other languages, for dissemination outside the region, where appropriate.
<b>Context and any related preconditions</b>	
<b>Targeted users / Beneficiaries</b>	Workers and leaders of democratic trade unions.
<b>Challenges /negative lessons - Causal factors</b>	
<b>Success / Positive Issues - Causal factors</b>	
<b>ILO administrative issues (staff, resources, design, implementation)</b>	Sufficient resources need to be allocated to an effective dissemination strategy. Project design should consider out-sourcing to specialist partner organisations or agencies.
<b>Other relevant comments</b>	

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Name of Evaluator: Dave Spooner

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May 2015

The following Lesson Learned has been identified during the course of the evaluation. Further text can be found in the full evaluation report.

LL Element	Text
<b>Brief summary of lesson learned (link to project goal or specific deliverable)</b>	Projects designed to increase the capacity of workers organisations in promoting and defending FPRW need to <b>recognise the important role of and engage with sectoral unions, national sectoral federations, and the Global Union Federations</b> in providing sustained and long-term support to trade union development, alongside the national centres and their international federation structures. <i>See Appendix IV.</i>
<b>Context and any related preconditions</b>	The strength and resilience of trade union national centres is dependent on strong workplace and sectoral unions. The experience of the project has demonstrated that while the ILO's primary constituents in workers' organisations are the national centres, in some circumstances union development has to start with capacity-building in workplace or sectoral union structures. These are more immediately and closely related to the GUFs than to the international structures of the national centres, particularly in relationships with employers. GUFs may be the main providers of sustained support and solidarity beyond the project's lifetime.
<b>Targeted users / Beneficiaries</b>	Workers, workplace unions, national sectoral unions and federations.
<b>Challenges /negative lessons - Causal factors</b>	Recognition that strategies and policies of GUFs are not necessarily congruent with one another, or with other international trade union institutions.
<b>Success / Positive Issues - Causal factors</b>	Potential for coordinated intervention, avoidance of duplication of effort, long-term sustainability for workplace and sectoral unions.
<b>ILO administrative issues (staff, resources, design, implementation)</b>	Consultation and engagement of GUF representatives in the design and implementation of project activity where the beneficiaries are workplace or sectoral union representatives.
<b>Other relevant comments</b>	



## Appendix II: Emerging Good Practice

### ILO Emerging Good Practice Template

**Evaluation Title:**

Strengthening of Workers' Organisations in the Arab Countries through Economic, Social and Legal Literacy

**Project**

TC/SYMBOL:

RAB/11/02/USA

**Name of Evaluator:** Dave Spooner

**Date:**

May 2015

The following emerging good practice has been identified during the course of the evaluation. Further text can be found in the full evaluation report.

GP Element	Text
<b>Brief summary of the good practice (link to project goal or specific deliverable, background, purpose, etc.)</b>	A careful and sensitive approach towards financial support for fragile, precarious or nascent workers' organisations, which did not endanger their long term sustainability through the development of financial dependency on external donors.
<b>Relevant conditions and Context: limitations or advice in terms of applicability and replicability</b>	Large sums of donor money cannot be absorbed by newly formed or reformed unions, and only fuels the danger corruption and division. Donor funds can also undermine efforts to achieve sustainability through the regular collection of union membership dues. Nevertheless, there are circumstances where modest financial support, or support in kind, can be of value in sustainably building capacity.
<b>Establish a clear cause-effect relationship</b>	Inappropriate levels of financial support frequently leads to a failure of unions to develop financial sustainability based on membership dues, may generate conflict within and between unions, and threaten financial accountability and democratic governance.
<b>Indicate measurable impact and targeted beneficiaries</b>	Measureable indicators not available – indeed it is the absence of indicators (of dependency) that demonstrates good practice. Beneficiaries include those workers' organisations that have been assisted through project activities.
<b>Potential for replication and by whom</b>	Should be a major factor in project design where the beneficiaries are democratic membership-based workers' organisations. To be replicated by project designers.
<b>Upward links to higher ILO Goals (DWCPs, Country Programme Outcomes or ILO's Strategic Programme Framework)</b>	Not applicable.
<b>Other documents or relevant comments</b>	

## ILO Emerging Good Practice Template

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### Project

TC/SYMBOL:

RAB/11/02/USA

Name of Evaluator: Dave Spooner

Date:

May 2015

The following emerging good practice has been identified during the course of the evaluation. Further text can be found in the full evaluation report.

GP Element	Text
<b>Brief summary of the good practice (link to project goal or specific deliverable, background, purpose, etc.)</b>	High quality training of trainers provision, based on robust pedagogical methodology. This led to the establishment of teams of trained volunteer trainers, able to deliver substantial local and national training events for members and activists with very little further support or assistance. This provides a good basis of a sustainable trade union education and training programme appropriate for unions with limited resources. It is an objective frequently proposed in capacity-building projects, but rarely achieved.
<b>Relevant conditions and Context: limitations or advice in terms of applicability and replicability</b>	The establishment of sustained education and training programmes for unions with limited resources depends on high-quality training and support to trainers, building pedagogical skills appropriate to the membership and organising policies, plus the commitment of volunteer union activists prepared to deliver programmes for little or no personal gain.
<b>Establish a clear cause-effect relationship</b>	Interviews with trainers receiving training demonstrated a good knowledge of education and training methodology, appreciation of the skills developed through the project, and their commitment to long-term education provision within their respective unions.
<b>Indicate measurable impact and targeted beneficiaries</b>	Number of courses and training events delivered by trainers who had undergone training in the project; trade union members and representatives.
<b>Potential for replication and by whom</b>	Adoption of, or learning from, the training methodologies employed in the project by project designers and ILO staff and consultants responsible for training activity.
<b>Upward links to higher ILO Goals (DWCPs, Country Programme Outcomes or ILO's Strategic Programme Framework)</b>	Not applicable.
<b>Other documents or relevant comments</b>	

### Appendix III: Summary of Project Activities

Activity 1.1: Assess the needs of workers' organisations			
Date	Activity	Location	No. of Participants
14-15 July 2012	Mission to Oman to agree cooperation with GFOTU	Muscat	-
16-17 July 2012	Mission to Bahrain to agree cooperation with GFBTU	Manama	-
10-11 Aug 2012	Meeting with GFBTU to discuss critical developments in Bahrain	Beirut	-
12-14 Oct 2012	FENASOL workshop: "the role of trade unions in the light of socio-economic situation in Lebanon" (Two months later FENASOL declared its independence from CGTL).	Beirut	38 men 6 women
11-13 Dec 2012	Participation in conference "the role of trade unions in the light of socio-economic situation in the oPt". Cooperation agreed with PGFTU for activities in the West Bank (ToT, social protection, wages, integration of women into trade unions)	Amman?	43
26 Mar 2013	Meeting with GFOTU. Redesign of proposed activities in Oman to support forthcoming first General Congress.	Muscat	-
2-3 June 2013	Mission to Yemen to agree cooperation with GFYTU	Sanaa?	-
23-25 Oct? 2013	Mission to Oman to discuss preparation for GFOTU General Congress (Feb 2014)	Muscat	-
21-22 Nov 2013	Meeting with FITUJ to agree new activities: strengthening internal democracy; formation of a national alliance for freedom of association	Amman	-
16-17 Feb 2014	GFOTU: support to 2 <sup>nd</sup> General Conference	Muscat?	

Activity 1.2: Develop strategies and action plans for workers' organisations			
Date	Activity	Location	No. of Participants
7-9 July 2012	Workshop with GFJTU and new independent trade unions: "the role of trade unions in light of the socio-economic situation in Jordan"	Amman	27 men 0 women

Activity 1.2: Develop strategies and action plans for workers' organisations			
Date	Activity	Location	No. of Participants
4-6 Sept 2012	GFBTU workshop: "the role of trade unions in light of the socio-economic situation in Bahrain" (to support GFBTU preparations for the planned GFBTU General Conference, 29 Sept 2012).	Manama	45 men 9 women
12-14 Oct 2012	FENASOL workshop: "Towards an independent trade union movement".	Beirut	38 men 6 women
3-5 Nov 2012	Regional conference "Trade union rights and freedoms and the right to strike" (in collaboration with ITUC and ILO-ACTRAV).	Cairo	19
11-13 Dec 2012	PGFTU workshop: "the role of trade unions in light of socio-economic situation in the oPt"		43 men 4 women
2-4 Mar 2013	PGFTU executive committee meeting to review PGFTU constitution and development of comprehensive socio-economic policy platform. (financed by ILO regular budget)	Cairo	-
17-19 May 2013	FENASOL workshop: "Towards an independent trade union movement"	Beirut	30 men 7 women
2-3 Jun 2013	GFYTU workshop: "the role of trade unions in light of socio-economic situation in Yemen"	Sanaa?	?15 men ?3 women
25-27 Jun 2013	FENASOL training workshop for nascent workers' committees, leading to development of action plans, and three follow-up sessions with workers' groups.	Beirut	18 men 6 women
16-19 Sep 2013	Participation in ILO-ACTRAV / ILO-MAGNET / SARTUC workshop: "Promoting trade union cooperation on labour migration in origin and destination countries".		
25-26 Jan 2014	FENASOL meetings with executive board members to discuss options for FENASOL engagement with national, regional and international trade union organisations.	Beirut	40 men 6 women
10-18 Feb 2014	GFOTU: support in preparation and organisation of GFOTU first General Congress.	Muscat	
1-2 Mar 2014	FENSAOL 1 <sup>st</sup> Workshop on revising internal bylaws, regarding democracy, independence and representation.	Beirut	28 men 7 women
11-14 Apr 2014	ATUC (ITUC-Arab Region) Meeting: "Our path towards social justice: choices, priorities and means of action", producing a draft action plan for presentation at ATUC founding congress.	Tunis	
25-26 Apr 2014	JFITU Workshop on internal democracy	Amman	

Activity 1.2: Develop strategies and action plans for workers' organisations			
Date	Activity	Location	No. of Participants
17-18 May 2014	FENASOL 2 <sup>nd</sup> Workshop on revising internal bylaws	Beirut	
29 Jun – 4 Jul 2014	ILO-ACTRAV, ILO-COOP, ILO-MIGRANT and ITUC mission from Geneva to Beirut to discuss migrant and informal workers, leading to proposal for FENASOL workers' centre for informal and migrant workers	Beirut	-
Jul-Sept 2014	FENASOL: technical support for the establishment of the Domestic Workers Union. Training for migrant domestic workers provided in collaboration with ILO's PROWD project	Beirut	>50
Jul-Sept 2014	FENASOL: technical support for the establishment of a multi-purpose workers' centre to organise and support informal workers, including legal aid services.	Beirut	-
1-2 Oct 2014	ATUC Founding Congress. Documents adopted on informality, social protection, migration, women, youth – made possible by project's technical support.	Amman	17 unions from 11 countries
Nov-Dec 2014	Capacity-building workshops for domestic workers:	Beirut	-
	"Principles of outreach, organising, mobilisation" (2)	Beirut	70
	"Teamwork, group dynamics, collective leadership" (5)	Beirut	
	"Need to establish an independent union" (6)	Beirut	50
15-17 Dec 2014	GFOTU Workshop: "the role and importance of sectoral trade unions" (mostly oil, gas, tourism).	Muscat	40
10 Jan 2015	GFBTU Workshop: "Establishing sectoral unions" (postponed from Dec 2014).	Manama	
Feb 2015	FENASOL Workshop: "Organising workers in the informal economy, targeting agricultural workers" (postponed from 2014)		

<b>Activity 2.1: Provide workers' organisations with technical inputs on priority issues</b>			
<b>Date</b>	<b>Activity</b>	<b>Location</b>	<b>No. of Participants</b>
25-26 Aug 2012	Participation in the second meeting of the Arab Democratic Trade Union Forum, and presentation on "Arab Spring and the issue of employment"	Tunis	-
27 Aug 2012	Preparation meeting for GFBTU workshop: "the role of trade unions in light of the socio-economic situation in Bahrain"	Tunis	-
8-10 Sept 2012	Tripartite Workshop: "the role of social dialogue and collective bargaining in securing social stability" in Oman	Muscat	130
13-15 Oct 2012	GFOTU workshop: "Economic globalisation and its impact on wage policies". Recommended project to develop briefing paper on minimum wage as a basis for collective bargaining	Muscat	40
22-24 Oct 2012	Participation in ILO-ROAS tripartite workshop: "ILO Convention 189: Raising awareness and sharing knowledge on decent work for domestic workers"	Cairo	
4-6 Nov 2012	Regional workshop: "Women and trade unions: decent work through organising"		34
19-23 Nov 2012	Participation and presentation in training session "Trade union training on social protection and social security policies"	ITC, Turin	
Oct-Dec 2012	Continuous support to GFBTU on proposed labour law reform	-	-
4-6 Feb 2013	Regional workshop: "Women and trade unions: decent work through organising" unions and women's rights NGOs. (financing of workshop from project?)		30
8-9 Mar 2013	CGTL Workshop: "Wage adjustment and protecting the purchasing power of workers": Wage policies for economic development; Structure of Lebanese economy; Importance of the minimum wage	Beirut	34
25-27 Mar 2013	GFOTU Workshop: "Integrating women and youth in trade unions"	Salalah	30 men 10 women
26 Apr 2013	FITUJ: support for FITUJ Founding Congress	Amman	
27-28 May 2013	Participation and presentation at national tripartite workshop: "Perspectives on Tripartite Cooperation"		

<b>Activity 2.1: Provide workers' organisations with technical inputs on priority issues</b>			
<b>Date</b>	<b>Activity</b>	<b>Location</b>	<b>No. of Participants</b>
Jul-Sep 2013	FITUJ: provision of comprehensive review of Jordanian labour law, supporting FITUJ proposals for amendments to bring law into line with C87 and C98	Amman	-
Jul-Sep 2013	GFBTU: technical support to GFBTU preparing for negotiations with government for tripartite agreement to settle labour crisis.	Manama	-
6-7 Nov 2013	Regional expert meeting: "A workers' perspective on socio-economic development in the Arab region". [Published Report?]		
21-22 Nov 2013	GFJTU Workshop: "Wages and social protection in Jordan"	Amman	
27-28 Nov 2013	GFYTU Workshop for local experts and GFYTU leadership to review outlines of papers in preparation for Yemen Study Days (economic policy; democracy, development and trade unions; employment and informality; social protection; labour law and ILS; education and training).	Sana'a	
4-6 Mar 2014	GFYTU workshop: Yemen Study Days, presentation and discussion of research by local experts. GFYTU committee formed to progress action plan, reform of bylaws, and preparation of General Congress.	Sana'a	
11-13 Mar 2014	GFJTU Workshop to move the GFJTU's commitment to gender equality. Jointly conducted with ILO-ROAS Gender Unit.	Amman	
4 Apr 2014	Gulf Centre for Journalists: training session on trade union rights for journalists.		
22-23 May 2014	Regional Workshop: "Unionisation in Arab countries: challenges and prospects" (workers' organisations from Bahrain, Lebanon, Yemen, Oman, Jordan, Palestine)	Beirut	Report
23-25 Jun 2014	PGFTU workshop on reform of social security systems	Amman	15
Jul-Sept 2014	Production of literacy briefs on informality and migrant workers.	-	-
27-30 Sep 2014	ATUC workshops in preparation for the ATUC founding congress (1-2 Oct), conducted by ITUC, covering improvement of women's rights; youth participation in trade unions; fundamental rights in Mediterranean countries; EU free trade agreements.	Amman	

Activity 2.1: Provide workers' organisations with technical inputs on priority issues			
Date	Activity	Location	No. of Participants
Oct-Dec 2014	Development and finalisation of five economic literacy briefs. Two developed "by the WTO and through the Euro-Mediterranean partnership". Three by project team on informal economy, social protection and migrant workers.	-	-
1-5 Dec 2014	Participation and presentation at ACTRAV course: "Young men and women at work in the Arab region: trade union strategies for organising and promoting their rights and interests"	ITC, Turin	
5-6 March 2015	FITUJ workshop on gender issues.	Amman	

Activity 2.2: Implement a comprehensive training programme			
Date	Activity	Location	No. of Participants
25-28 Aug 2012	<p><b>GFBTU First ToT "Adult learning and Communication"</b></p> <p>Theoretical Preparation: (Educating adults, Acting within groups, Successful communications, Facilitation techniques and methods, Elaborating training modules)</p> <p>Training Modules: General pedagogical strategy, Detailed pedagogical strategy, Energizing techniques</p> <p>Training on facilitation: Training guide produced by trainees, Evaluation of facilitators, Developing the training guide</p>	Bahrain	15
2-4 Dec 2012	GFOTU 3 <sup>rd</sup> TOT workshop: "Managing Groups" (Nabil). Covered: Definition of groups, Models of human behaviour, Managing individual disputes, How to face the 'brawler', Managing discussions	Oman	14
5-9 Dec 2012	GFBTU 2 <sup>nd</sup> , 3 <sup>rd</sup> and 4 <sup>th</sup> sessions" of ToT. Had to be organised in Beirut as ILO banned from entering Bahrain: Means and techniques of facilitation, Preparation of training topics, Training on facilitation	Beirut	15
13-15 Jan 2013	GFOTU 4 <sup>th</sup> ToT: "Facilitation Techniques and Methods": Facilitation methods, Role-playing techniques, Case study techniques, Small group techniques, Brainstorming techniques, Presentation techniques, Drafting questionnaires, Workshop Evaluation	Oman	14
3-5 Mar 2013	GFOTU 5 <sup>th</sup> ToT: "Developing Trainers' Skills": Workshop planning, Collecting/ analysing information, Identifying workshop objectives, Implementing the workshop, Monitoring and evaluation, Reporting	Oman	14



Activity 2.2: Implement a comprehensive training programme			
Date	Activity	Location	No. of Participants
6-10 Apr 2013	GFOTU 6 <sup>th</sup> ToT: "Preparing Training Modules": Bargaining techniques, Recruitment and mobilisation, Trade union rights, Role of trade unions, Integrating women in trade unions	Oman	14
9-11 Apr 2013	GFBTU training workshop "Trade Union Rights & Freedoms": Universal Human Rights; International Covenant on Social, Economic & Cultural Rights; International labour standards; Bahraini labour legislation	Bahrain	15
11-13 May 2013	GFBTU training workshop "Integrating Women & Youth into Trade Unions"		15
15-17 May 2013	PGFTU training workshop on collective bargaining, for executive committee members of Palestinian trade unions (1 of 3)	Nablus	17
19-23 May 2013	GFOTU 7 <sup>th</sup> (final) ToT in Oman: evaluating participants' training capacities.	Muscat	12
9-10 June 2013	PGFTU training workshop for executive committee members pf Palestinian trade unions: "Collective bargaining in light of ILS and Palestinian labour legislation" (2 of 3): ILS and collective bargaining; Collective bargaining in Palestinian labour law; Freedom of Association and Collective Bargaining	Nablus	17
25-27 June 2013	GFBTU training workshop "Collective bargaining: concepts, methodologies and communications procedures": Negotiation concepts; SWOT analysis; Socio-economic and social context; Negotiation skills, tactics and strategies	Manama	
21-22 Sept 2013	GFJTU workshop: "Trade union rights and freedoms": ILS and trade union freedoms, employment, termination of employment, conflicts at work etc; Gaps in the Jordanian labour code; Recommendations for amendments to the labour code	Amman	Report
26-29 Oct 2013	FITUJ 1 <sup>st</sup> ToT workshop: "Adult Learning"	Amman	
17-19 Nov 2013	PGFTU training workshop on collective bargaining, for executive committee members pf Palestinian trade unions (3 of 3)	Nablus	17
13-16 Dec 2013	FITUJ 2 <sup>nd</sup> ToT Workshop: "Group Management and Preparation of Training Modules"	Amman	

Activity 2.2: Implement a comprehensive training programme			
Date	Activity	Location	No. of Participants
12-14 Mar 2014	GFBTU final TOT Workshop. Held in Amman due to impossibility of access into Bahrain.	Amman	14
14-17 Mar 2014	FITUJ: 3 <sup>rd</sup> ToT Workshop "Discussing training modules" (FPRW, gender equality, social security, decent work, collective bargaining, ILS).	Amman	
Jul-Sep 2014	Production of detailed training manual on informality and migrant workers.	-	-
21-24 Sept 2014	Regional ToT: selected trainers from Bahrain, Jordan, Oman, Lebanon and OPT, focused on informal and migrant workers. Testing of training manual, and development of local action plans.	Beirut	20
29-30 Sept 2014	PGFTU ToT for team of negotiators.	Nablus?	16
19-30 Oct 2014	GFOTU National Workshops (4): organising women workers; social dialogue and collective bargaining; ABC of trade unions; the right to strike and social dialogue	Muscat	92
18-20 Nov 2014	GFBTU National Workshop: FOA and social dialogue	Manama	40
24-26 Nov 2014	FITUJ National Workshop: FOA and minimum wage	Amman	40
TBC	FITUJ Further training for trainers	Amman	50 (TBC)
TBC	GFBTU Further training for trainers	Manama	

Activity 2.3: Establish a Labour Education & Research Network for the Arab Region			
<i>Other than the production of a list of experts and specialists in the region, this was not achieved.</i>			
Date	Activity	Location	No. of Participants

<b>Activity 2.4: Workers organisations are better equipped to participate in policy debates</b>  <i>Reports assumed to be included under 2:1 Provide workers' organisations with technical inputs on priority issues</i>			
Date	Activity	Location	No. of Participants

<b>Activity 2.5: Knowledge products developed to provide technical support for trade unions</b>  <i>Reports assumed to be included under 2:1 Provide workers' organisations with technical inputs on priority issues</i>			
Date	Activity	Location	No. of Participants

<b>Activity 3.1: Workers' organisations are in a better position to advocate FPRW</b>			
Date	Activity	Location	No. of Participants
1-2 Oct 2014	A position paper covering social protection and the informal economy adopted at the ATUC Congress.	-	-
April 2015	A common action plan on migrant labour is to be an output of a planned inter-regional meeting in April 2015.	-	-

<b>Activity 3.2: Freedom of association and basic workers' rights gain ground in public opinion</b>			
Date	Activity	Location	No. of Participants
Oct-Dec 2014	Production of short film on FOA.	-	-
Oct-Dec 2014	A leaflet for migrant domestic workers in Lebanon was produced in seven languages	Beirut	-

Sources: Quarterly reports; Report to the PAC (April 2013), ILO-ROAS staff interviews

## Appendix IV: Affiliates of the major GUFs in the participating countries

	PSI	UNI	EI	BWI	IndustriALL	ITF	IUF
Jordan	General Trade Union for Workers in Electricity (GTUWE)	General Trade Union of Banks, Insurance and Auditing Employees	Jordanian Teachers Association	General Trade Union of Construction Workers	General Trade Union of Workers in Textile Garment & Clothing Industries - JTGCU	General Trade Union of Workers in Air Transport and Tourism	General Trade Union of Workers in Public Services & Free Occupations
	General Union of Petroleum and Chemical Workers in Jordan (PCWJ)		General Union of Workers in Teaching		General Union of Petroleum & chemical Workers in Jordan - GUPCW	General Union of Port Workers	
	Trade Union of Workers in Health Services (TUWHS)				General Trade Union of Workers in Mining and Metal Industries		
Lebanon	Middle East Airlines and Affiliates Companies Syndicate (MEAACS)	Federation of Bank Employees' Union in Lebanon	Teachers Syndicate of Lebanon	General Services Trade Union	Professional Union of Syndicates for Workers & Employees of Chemical Materials	Lebanese Cabin Crew Association	n/a
	Syndicat des Employés de la Caisse Nationale de la Sécurité Sociale au Liban (CNSS)		Ligue des Professeurs de l'Enseignement Secondaire Public du Liban		Sewing, Spinning and Textile Workers' Union Lebanon - SSTWUL	Syndicate of Middle East Airlines and Affiliate Companies	
	Syndicat des Employés Electricité Nord du Liban-Kadisha (SEENL-K)		Comité des enseignants techniques officiels		Syndicat des employés et Ouvriers de Holcim Liban	Union of Beirut Port Employees	
	Syndicat des Employés et Ouvriers de la Régie Libanaise des Tabacs et Tombacs (SRLTT)		Public Primary Schools Teachers League in Lebanon				
	Syndicat des Employés et Ouvriers de l'Office						

	PSI	UNI	EI	BWI	IndustriALL	ITF	IUF
	des Eaux de Beyrouth et du Mt Liban (SEOEB)						
	Syndicat des Employés et Ouvriers du Port de Beyrouth (SEOPB)						
	Syndicat des Ouvriers et Employés de l'Electricité du Liban (SEDL)						
Palestine	General Trade Union of Workers in Health Services - Gaza (GTUWHS)	General Association of Telecommunication and IT Workers	General Union of Palestinian Teachers	National Union of Building and Wood Workers	General Union of Mechanical Engineering & Electrical Workers	General Union for Transport Workers	General Union of Agriculture and Food Industries Workers (GUAFIW)
	General Union of Municipality Workers (GUMW)	Palestinian Audiovisual Union	General Union of Workers in Kindergarten and Private Schools		General Union of Petrochemical Workers in Palestine	Palestine Bus Drivers General Union	
	Health Services Union – West Bank (HSU-PGFTU)	National Union of Banking and Insurance	أساتذة نقابات اتحاد مجلس الجامعات موظفين و الفلسطينية (PFUPE)		General Union of Textile Workers - GUTWP		
	Public Services Union – West Bank (PSU-PGFTU)	PGFTU					
Oman	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Bahrain	n/a	GFBTU	n/a	GFBTU	n/a	n/a	n/a
Yemen	Public Services Union (PSU-Yemen)	n/a	Yemen Teachers Syndicate	General Trade Union Of Building and Wood Workers	General Union of Petroleum, Minerals and Chemicals Workers	Yemeni Aviation Engineers Syndicate	n/a
					General Union of Electricity and	Employees and Workers Syndicate	

	PSI	UNI	EI	BWI	IndustriALL	ITF	IUF
					Energy	of Yemen Airways	
						General Union For Transport and Transportation Workers	
						Labor Committee of Aden Container Terminal	

## Appendix V: Terms of Reference



### INTERNATIONAL LABOUR ORGANIZATION

#### TECHNICAL COOPERATION

#### Terms of Reference (ToR) for Final Independent Project Evaluation

#### Strengthening of Workers' Organizations in the Arab Countries through Economic, Social and Legal Literacy

##### 1.BACKGROUND INFORMATION

###### Project background, rationale

The overall project objective is to develop the capacity of workers' organizations in the Arab region to participate effectively in policy debates, influence public decisions, and defend workers' rights and interests. The immediate objectives of the project are:

- 1) Strengthening the institutional capacity of workers' organizations.
- 2) Strengthening the technical capacity of workers' organizations.

The project was designed as a response to the waves of popular movements and protests that swept the Arab Region in 2011, and where workers and trade unions took active part in these democratic actions. The project stemmed from the lessons learned from the Arab Spring that showed that countries with an active trade union movement, characterized by democracy and independence, even in relative terms, have witnessed a leading role for trade unions which have provided an umbrella for the societal and popular democratic movements. In contrast, countries where the trade union movement was compromised, subordinated and dependent, have witnessed the manipulation of these union structures as tools under the oppressive control of the authorities, creating circumstances for the promotion of new independent trade unions.

In fact, the Arab uprisings showed that the greater the deficits in real and genuine participation of workers, the less responsive were the policies and priorities to people's needs and aspirations. This stark contrast has highlighted the powerful potential of unionism – and brought it forward as a key development priority. The ongoing events in the region have confirmed that in the absence of genuine mechanisms for social dialogue with inclusive, equitable and independent workers' representation, workers and people at large resorted to extra-institutional channels and actions to voice their demands, rights, and interests.

Accordingly, the project aims at strengthening the institutional capacity of workers' organizations (immediate objective 1) and their technical capacity (immediate objective 2). On the institutional level, the project supported workers' organizations in enhancing their internal democracy and independence through various methods, ranging from reforming internal bylaws, using ILO supervisory mechanisms, expanding outreach for workers and holding General Congresses. Moreover, on the technical level, the project supported workers' organizations through policy advice, production of knowledge materials and conducting workshops on priority issues for the labour movement. Following the one year extension a third immediate objective was added on: "Supporting workers' organization in Advocacy on fundamental principles and rights at work".

The direct beneficiaries of the project included women, men, young, migrant, and unorganized workers in the formal and informal economies, as well as leaders and members of independent, free, and representative workers' organizations committed to social justice and democracy in the eight countries. Where no such workers' organizations exist, support was provided for encouraging and enabling their establishment through training and technical advice on financial autonomy and management training. A key emphasis in planning and delivery will be the inclusion of the right to organize and bargain collectively of informal workers, migrant workers, women, and youth. The project was active in Lebanon, Jordan, Oman, Bahrain, Yemen, and OPT.

In 2014, an independent internal mid-term evaluation of the project was conducted that underlined the progress and achievements of the project while noting its shortfalls. The findings of the mid-term evaluation were taken into account when deciding on the activities for the remaining lifetime of the project.

The "Strengthening Workers' Organizations in Arab countries through economic, social and legal literacy has a duration of 24 months and a budget of 1.98 Million USD. The project officially started in September 2011, however its implementation started in April 2012 as the project team was recruited. The project ended in April 2014 and got a cost- extension for one year till May 2015.

#### Alignment with DWCP outcomes, P&B outcomes

The project contributes to the Decent Work Country Programs (DWCP) that are planned or already under way in the countries mentioned. DWCPs promote decent work as a key component of national development strategies and represent the distinct ILO contribution to UN country programs. DWCP priorities and outcomes reflect the strategic results framework of the ILO, adapted to national situations and priorities – within an integrated approach. The proposed project addresses the strategic objectives of the ILO, particularly Outcome 10 (workers have strong, independent and representative organizations), as well as Outcome 14 (the right to freedom of association and collective bargaining is widely known and exercised) and Outcome 18 (international labour standards are ratified and applied).

#### Alignment with other ILO interventions

The Project is aligned with wider ILO interventions in the region notably the regional and national interventions centred on employment, migration, social protection, and gender.

#### ILO's Comparative Advantage

The ILO has three main comparative advantages, which are reflected in its common principles of action. First, the ILO is the only international tripartite organization, including governments, workers' organizations, and employers' organizations on an equal basis. Second, the ILO is



custodian of international labour standards, which are backed by a supervisory system that is unique at the international level and that helps to ensure that countries implement the conventions they ratify. Third, the ILO is at the forefront at the international level in promoting and advocating for gender equality in the world of work.

### ***Management Set-Up***

Three-Level management set-up

The Project Team (CTA, 2 national officers and project assistant based in Beirut): Day-to-day project implementation under the supervision of the Senior ACTRAV Specialist

ACTRAV: Technical back-stopping

Project Steering Committee: Strategic directions and policy guidance

### ***Major milestones achieved by outcome***

- Develop strategies and action plans for workers' organizations:
  - The establishment of the independent trade union federation in Jordan
  - The establishment of the Domestic Workers Union in Lebanon
  - Three general assemblies were conducted in Oman, Bahrain and Jordan without outside interference
  - 3 observation were submitted by Jordan, Bahrain and Lebanon
- Provide workers' organizations with technical inputs on priority issues
  - The GFBTU and GFYTU issued a comprehensive socio-economic programme on key priority issues in Bahrain.
  - 7 thematic economic literacy briefs were developed
  - One regional socio-economic development report was issued
- Implement a comprehensive training program
  - Three groups of trainers were trained and empowered in Palestine, Jordan, Oman and Bahrain (15 people in each country)
- Establish a Labor Education and Research Network for the Arab Region:
  - A number of regional expert meetings were conducted
- Workers' organizations are in a better position to advocate for FPRW:
  - The establishment of the Arab Trade Union Confederation and the Congress adopted two position papers developed by the Project on migrant workers and informal workers
- Freedom of association and basic workers' rights gain ground in public opinion:
  - Short movie on FOA produced
  - Post cards on FOA developed.

## **3. PURPOSE AND SCOPE OF THE EVALUATION**

### *Purpose*

- A final independent evaluation will be conducted to examine the efficiency, effectiveness, relevance, potential impact and sustainability of the project. The evaluation report shall reflect findings from this evaluation on whether the project has achieved its stated objectives, produced the desired outputs, and the extent to which it realized the proposed outcomes. This evaluation will also identify strengths and weaknesses in the project design, strategy, and implementation as well as lessons learned with recommendations for ILO's considerations in the design of a the second phase.
- The evaluation will comply with the ILO evaluation policy, which is based on the United Nations Evaluation Norms and Standards, and the UNEG ethical guidelines will be followed.

### *Scope*

- The evaluation will cover the entire project (each component) and its entire duration.
- In addition, the scope will cover the multiple geographical dimensions of the project: The evaluator will conduct missions to Lebanon, Bahrain, Jordan and Oman as the bulk of the Project's work was in these countries. The evaluator will meet workers' organizations as well as independent experts and partners/stakeholders.
- The evaluation will take place between February and April 2015.
- The evaluation will integrate gender equality as a cross-cutting concern through-out its methodology and all deliverable, including the final report.
- Primary users of the evaluation mainly consist of ILO ROAS, the ILO constituents in targeted countries, and the donor.  
Secondary users include other project stakeholders and units within the ILO that may indirectly benefit from the knowledge generated by the evaluation (i.e...)

## **4. EVALUATION CRITERIA AND QUESTIONS**

The evaluation utilises the standard ILO framework and the major criteria utilised within the ILO framework are:

- ☐ Relevance and strategic fit – the extent to which the objectives are in keeping with sub-regional, national and local priorities and needs, the constituents' priorities and needs, and the donor's priorities for the project countries;
- ☐ Validity of design – the extent to which the project design, logic, strategy and elements are/ remain valid vis-à-vis problems and needs;
- ☐ Efficiency - the productivity of the project implementation process taken as a measure of the extent to which the outputs achieved are derived from an efficient use of financial, material and human resources;
- ☐ Effectiveness - the extent to which the project can be said to have contributed to the development objectives and the immediate objectives and more concretely whether the stated outputs have been produced satisfactorily; in addition to building synergies with national initiatives and with other donor-supported projects, project visibility
- ☐ Impact - positive and negative changes and effects caused by the Project at the subregional and national levels, i.e. the impact with social partners and various implementing partner organisations;
- ☐ Effectiveness of management arrangements; and
- ☐ Sustainability – the extent to which adequate capacity building of social partners has taken place to ensure mechanisms are in place to sustain activities and whether the existing results are likely to be maintained beyond project completion.

### **Evaluation questions**

#### **Relevance:**

- How does the project approach fit the on-going trends and patterns of workers issues in the selected countries?

- How do the project objectives fit under the ILO Decent Work Country Programmes for countries where it exists and broader development frameworks (UNDAF)?
- How do the project objectives respond to donor priorities in the countries targeted?
- How did the intervention's design and implementation contribute (or not) toward the ILO goal of gender equality, international and regional gender equality conventions, and national gender policies and strategies?
- Are the project objectives aligned with tripartite constituents objectives?

**Validity of design:**

- Is the project strategy and structure coherent and logical (what are logical correlations between objective, outcomes, and outputs);
- Were project assumptions realistic; Did the project undergo a risk analysis and design readjustment when necessary? - In what ways did the project adjust its strategy based on the recommendations of the midterm evaluation?

**Effectiveness:**

- Has the project achieved the planned objectives? (analysis of achievements and challenges by outcome is required) In cases where challenges were faced, what intermediate results can be reported towards reaching the outcomes?
- To what extent did the project build synergies with national initiatives and with other donor-supported projects?
- What, if any, alternative strategies would have been more effective in achieving its objectives?
- How well did the project respond to the midterm evaluation recommendations?
- Does the project make use of monitoring and evaluation framework? Were data collection and monitoring used as per the recommendations of the midterm review?

**Effectiveness of management arrangements:**

- Were the management arrangements effective?
- Has the project received adequate technical and administrative support from the ILO departments and units?

**Efficiency:**

- To what extent have project activities been cost-effective?
- To what extent has the project been able to build on other ILO or national/regional initiatives and create synergies in cost sharing?

**Impact orientation:**

- What is the likely contribution of the project initiatives, including the innovative approaches and methodologies piloted, to stated development objective?

**Sustainability:**

- Are project achieved results likely to be sustainable? What measures have been considered to ensure that the key components of the project are sustainable beyond the life of the project? - How will activities and/or management structures be financed when the project ends?

**Lessons learned:**

- What good practices can be learned from the project that can be applied to similar future projects/second phase?
- To what extent are the good practices documented and shared with the broader community?

## 5. METHODOLOGY

An independent evaluator will be hired by the ILO to conduct the evaluation.

The evaluation will be conducted through:

1- Desk Review:

The evaluator will review project background materials before conducting any interviews or trips to the countries.

2-Briefing: The evaluator will have an initial consultation with the ILO specialists and support staff in ROAS and Geneva. The objective of the consultation is to reach a common understanding regarding the status of the project, the priority assessment questions, available data sources and data collection instruments and an outline of the final assessment report. The following topics will be covered: status of logistical arrangements, project background and materials, key evaluation questions and priorities, outline of the inception and final report.

Following the initial briefing, the desk review and the inception report, the evaluator will have a mission to 4 countries as indicated above, and have meetings with constituents/stakeholders together with interpreters supporting the process if needed.

3-Individual Interviews and/or Group Interviews:

Individual or group interviews will be conducted with the following:

- a) Project Staff
- b) ILO ROAS DWT Senior Specialists in Gender, and Workers' Organizations, ILO ROAS RPS and DRD.
- c) ILO Headquarters technical departments;
- d) Donor representatives;
- e) Interviews with national counterparts (government, public institutions, social partners, IPs, etc.);
- f) Interviews of direct and indirect beneficiaries;
- g) Other donor agencies working in the relevant fields.

4-Debriefing: Upon completion of the missions, the evaluator will provide a debriefing to the Project teams, ILO DWT and HQ on the evaluation findings, conclusions and recommendations.

The evaluator will also debrief stakeholders to validate results.

The draft report will subsequently be shared with ILO ROAS, and constituents for comments.

## 6. MAIN DELIVERABLES

The main outputs of the evaluation consist of the following:

- i. Deliverable 1. Inception report
- ii. Deliverable 2. Draft evaluation report
- iii. Deliverable 3. Stakeholder debrief and PPt
- iv. Deliverable 4. Final evaluation report with executive summary
- v. Translation of the final report to Arabic (Project team)

### INCEPTION REPORT:

The evaluator will draft an Inception Report, which should describe, provide reflection and fine-tuning of the following issues:

- project background
- purpose, scope and beneficiaries of the evaluation
- evaluation criteria and questions
- methodology
- main deliverables
- management arrangements and work plan.

The inception report should be short, but exhaustive, not exceeding 5 pages.

**FINAL REPORT:**

The final version of the report will follow the below format and be in a range of 30-35 pages in length, excluding the annexes:

1. Title page
2. Table of Contents, including List of Appendices, Tables
3. List of Acronyms or Abbreviations
4. Executive Summary
5. Background and Project Description
6. Purpose of Evaluation
7. Evaluation Methodology and Evaluation Questions
8. Status of outcomes
9. Overall findings, conclusions and recommendations
10. Annexes (list of interviews, TORs, meetings' notes, relevant country information, policies, regulations or any other documents demonstrating the impact of the project)

- The quality of the report will be assessed against the EVAL Checklists 4, 5 & 6.
- The deliverables will be submitted in the English language, and structured according to the templates provided by the ILO.

## **7. MANAGEMENT ARRANGEMENTS AND REQUIREMENTS**

### **REQUIREMENTS**

The evaluator will have experience in the evaluation of development interventions, preferably with familiarity with the trade union movement including in the Arab Region, and an understanding of the ILO's tripartite culture. He/she will be guided by high professional standards and principles of integrity in accordance with the guiding principles of the International evaluation professionals associations. The evaluator should have an advanced degree in social sciences, proven expertise on evaluation methods, and knowledge about labour issues and the ILO approach. Full command of English will be required. Command of the national languages would be an advantage.

The final selection of the evaluator will be approved by the Regional Evaluation Focal Point in the ILO ROAS based on a short list of candidates from the Evaluation Manager /DWT, prepared in consultations with the ILO technical specialists.

### **ROLES AND RESPONSIBILITIES**

The External Evaluator is responsible for conducting the evaluation according to the terms of reference (ToR). He/she will:

- Review the ToR and provide input, propose any refinements to assessment questions, as necessary.
- Review project background materials (e.g., project document, progress reports).
- Prepare an inception report
- Develop and implement the assessment methodology (i.e. conduct interviews, review documents) to answer the assessment questions.
- Conduct preparatory consultations with the ILO REO and DWT prior to the assessment mission.
- Conduct field research, interviews, as appropriate and collect information according to the suggested format.
- Participate in a stakeholders debrief to present preliminary findings to the constituents.

- Prepare an initial draft of the assessment report with input from ILO specialists and constituents/stakeholders.
- Conduct briefing on findings, conclusions and recommendation of the assessment to ILO ROAS.
- Prepare the final report based on the ILO, SDC and constituents feedback obtained on the draft report.

The ILO Evaluation Manager is responsible for:

- Drafting the ToR;
- Finalizing the ToR with input from colleagues;
- Preparing a short list of candidates for submission to the Regional Evaluation Officer, ILO/ROAS and EVAL for final selection;
- Hiring the consultant;
- Providing the consultant with the project background materials;
- Participating in preparatory consultations (briefing) prior to the assessment mission;
- Assisting in the implementation of the assessment methodology, as appropriate (i.e., participate in meetings, review documents);
- Reviewing the initial draft report, circulating it for comments and providing consolidated feedback to the External Evaluators (for the inception report and the final report);
- Reviewing the final draft of the report;
- Disseminating the final report to all the stakeholders;
- Coordinating follow-up as necessary.

The ILO REO:

- Provides support to the planning of the evaluation;
- Approves selection of evaluation consultant and final versions of TOR;
- Reviews the evaluation draft and final report and submits to EVAL;
- Disseminates as appropriate.

The Project Team Leaders in consultation with the Project technical back stopper are responsible for:

- Reviewing the draft TOR and providing input, as necessary;
- Providing project background materials, including studies, analytical papers, reports, tools, publications produced, and any relevant background notes;
- Providing a list of stakeholders;
- Reviewing and providing comments on the inception report;
- Participating in preparatory briefing prior to the assessment missions;
- Scheduling all meetings and interviews for the missions;
- Ensuring necessary logistical arrangements for the missions and stakeholder workshop (hotel reservations, travel, interpretation);
- Reviewing and providing comments on the initial draft report;
- Participating in debriefing on findings, conclusions, and recommendations;
- Providing translation for any needed documents: TOR, PPP, final report.
- Making sure appropriate follow-up action is taken.

### **TIMEFRAME**

The following is a tentative schedule of tasks and anticipated duration of each for the Evaluator:

- Preparation (desk research, study of project documents) - 3 days
- Preparation of interview guides, refinement of evaluation questions, inception report - 2 days
- Interviews with constituents/stakeholders, project partners in countries – 10 days
- Stakeholder workshop, PPP, and minute of workshop – 2 days
- Report writing – 6 days
- Report finalization – 4 days

(A total of 27 workdays plus travel (travel cost and UN DSA) for the work of the External Evaluator).

<b>Task</b>	<b>Responsible person</b>	<b>Time</b>
Preparation of the TOR	Team/Ev Manager/REO/DWT	Dec-Jan
Sharing the TOR with all concerned for comments/inputs	Ev M	Dec-Jan
Finalization of the TOR	Ev M + REO	Jan
Approval of the TOR	ILO HQ/EVAL	Jan
Selection of consultant and finalization	Ev Manager, REO	Jan
Draft mission itinerary for the evaluator and the list of key stakeholders to be interviewed	Project Team	Jan
Excoll contract based on the TOR prepared/signed	Ev Manager	Feb
Brief evaluator on ILO evaluation policy	Ev Manager /REO	Feb
Drafting Inception Report	Evaluator	Feb
Evaluation Mission	Evaluator	March
Stakeholder debrief	Project team and evaluator	March
Debrief for ROAS	Evaluator	March
Submitting draft evaluation report	Evaluator	End March
Circulate draft for comments	Ev Manager	End March
Consolidated comments on the draft report, send to the evaluator	Ev Manager	Early April
Finalization of the report	Evaluator	April
Review of the final report	Ev Manager /REO	April
Submission of the final report to RO, EVAL	REO	April
Approval of the final report	EVAL	April

## 8. LEGAL AND ETHICAL MATTERS

- This independent evaluation will comply with ILO evaluation guidelines and UN Norms and Standards.
- These ToRs will be accompanied by the code of conduct for carrying out the evaluation "Code of conduct for evaluation in the ILO" (See attached documents).
- UNEG ethical guidelines will be followed through-out the independent evaluation.
- The consultant will not have any links to project management or any other conflict of interest that would interfere with the independence of the evaluation.

## Appendix VI: Inception Report

**Final Project Evaluation:** *Strengthening of Workers' Organizations in the Arab Countries through Economic, Social and Legal Literacy*

### INCEPTION REPORT

Date of the evaluation: March/April 2015

Name of Consultant: David Spooner

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#### Project Background

The overall project objective is to develop the capacity of workers' organizations in the Arab region to participate effectively in policy debates, influence public decisions, and defend workers' rights and interests. The immediate objectives of the project are:

- 1) Strengthening the institutional capacity of workers' organizations.
- 2) Strengthening the technical capacity of workers' organizations.

The project was designed as a response to the waves of popular movements and protests that swept across the Arab region. The project stemmed from the lessons learned from the Arab Spring that showed that countries with an active trade union movement, characterized by democracy and independence, even in relative terms, have witnessed a leading role for trade unions which have provided an umbrella for the societal and popular democratic movements. In contrast, countries where the trade union movement was compromised, subordinated and dependent, have witnessed the manipulation of these union structures as tools under the oppressive control of the authorities, creating circumstances for the promotion of new independent trade unions.

The Arab uprisings showed that the greater the deficits in real and genuine participation of workers, the less responsive were the policies and priorities to people's needs and aspirations. This stark contrast has highlighted the powerful potential of unionism – and brought it forward as a key development priority. The ongoing events in the region have confirmed that in the absence of genuine mechanisms for social dialogue with inclusive, equitable and independent workers' representation, workers and people at large resorted to extra-institutional channels and actions to voice their demands, rights, and interests.

Accordingly, the project aimed at strengthening the institutional capacity of workers' organizations (immediate objective 1) and their technical capacity (immediate objective 2). On the institutional level, the project supported workers' organizations in enhancing their internal democracy and independence through various methods, ranging from reforming internal bylaws, using ILO supervisory mechanisms, expanding outreach for workers and holding General Congresses. Moreover, on the technical level, the project supported workers' organizations through policy advice, production of knowledge materials and conducting workshops on priority issues for the labour movement. Following the one year extension a third immediate objective was added on: "Supporting workers' organization in Advocacy on fundamental principles and rights at work".



## **Purpose, scope and beneficiaries of the evaluation**

### Purpose

The final independent evaluation will be conducted to examine the efficiency, effectiveness, relevance, potential impact and sustainability of the project. The evaluation report shall reflect findings from this evaluation on whether the project has achieved its stated objectives, produced the desired outputs, and the extent to which it realized the proposed outcomes. This evaluation will also identify strengths and weaknesses in the project design, strategy, and implementation as well as lessons learned with recommendations for ILO's considerations in the design of a the second phase.

The evaluation will comply with the ILO evaluation policy, which is based on the United Nations Evaluation Norms and Standards, and the UNEG ethical guidelines will be followed.

### Scope

The evaluation will cover the entire project (each component) and its entire duration.

In addition, the scope will cover the multiple geographical dimensions of the project, with missions to Lebanon, Bahrain, Jordan and Oman as the bulk of the Project's work was in these countries. The evaluator will meet workers' organizations as well as independent experts and partners/stakeholders.

The evaluation will take place between March and April 2015.

The evaluation will integrate gender equality as a cross-cutting concern through-out its methodology and all deliverable, including the final report.

### Beneficiaries

Primary users of the evaluation mainly consist of ILO ROAS, the ILO constituents in targeted countries, and the donor. Secondary users include other project stakeholders and units within the ILO that may indirectly benefit from the knowledge generated by the evaluation

## **Evaluation criteria and questions**

### Criteria

The evaluation will utilize the major criteria within the standard ILO framework:

- Relevance and strategic fit – the extent to which the objectives are in keeping with sub-regional, national and local priorities and needs, the constituents' priorities and needs, and the donor's priorities for the project countries;
- Validity of design – the extent to which the project design, logic, strategy and elements are/ remain valid vis-à-vis problems and needs;
- Efficiency - the productivity of the project implementation process taken as a measure of the extent to which the outputs achieved are derived from an efficient use of financial, material and human resources;
- Effectiveness - the extent to which the project can be said to have contributed to the development objectives and the immediate objectives and more concretely whether the stated outputs have been produced satisfactorily; in addition to building synergies with national initiatives and with other donor-supported projects, project visibility
- Impact - positive and negative changes and effects caused by the Project at the sub-regional and national levels, i.e. the impact with social partners and various implementing partner organisations;

- Effectiveness of management arrangements; and
- Sustainability – the extent to which adequate capacity building of social partners has taken place to ensure mechanisms are in place to sustain activities and whether the existing results are likely to be maintained beyond project completion.

Evaluation questions

1. Relevance:
  - a. How does the project approach fit the on-going trends and patterns of workers issues in the selected countries?
  - b. How do the project objectives fit under the ILO Decent Work Country Programmes for countries where it exists and broader development frameworks (UNDAF)?
  - c. How do the project objectives respond to donor priorities in the countries targeted?
  - d. How did the intervention's design and implementation contribute (or not) toward the ILO goal of gender equality, international and regional gender equality conventions, and national gender policies and strategies?
  - e. Are the project objectives aligned with tripartite constituents objectives?
2. Validity of design:
  - a. Is the project strategy and structure coherent and logical (what are logical correlations between objective, outcomes, and outputs);
  - b. Were project assumptions realistic; Did the project undergo a risk analysis and design readjustment when necessary? - In what ways did the project adjust its strategy based on the recommendations of the midterm evaluation?
3. Effectiveness:
  - a. Has the project achieved the planned objectives? (analysis of achievements and challenges by outcome is required) In cases where challenges were faced, what intermediate results can be reported towards reaching the outcomes?
  - b. To what extent did the project build synergies with national initiatives and with other donor-supported projects?
  - c. What, if any, alternative strategies would have been more effective in achieving its objectives?
  - d. How well did the project respond to the midterm evaluation recommendations?
  - e. Does the project make use of monitoring and evaluation framework? Were data collection and monitoring used as per the recommendations of the midterm review?
4. Effectiveness of management arrangements:
  - a. Were the management arrangements effective?
  - b. Has the project received adequate technical and administrative support from the ILO departments and units?
5. Efficiency:
  - a. To what extent have project activities been cost-effective?
  - b. To what extent has the project been able to build on other ILO or national/regional initiatives and create synergies in cost sharing?
6. Impact orientation:
  - a. What is the likely contribution of the project initiatives, including the innovative approaches and methodologies piloted, to stated development objective?
7. Sustainability:
  - a. Are project achieved results likely to be sustainable? What measures have been considered to ensure that the key components of the project are sustainable beyond the life of the project?- How will activities and/or management structures be financed when the project ends?
8. Lessons learned:
  - a. What good practices can be learned from the project that can be applied to similar future projects/second phase?

- b. To what extent are the good practices documented and shared with the broader community?

## **Methodology**

The evaluation will be conducted through:

### Desk Review:

Review of project background materials before conducting interviews or trips to the countries.

### Briefing:

Initial consultation with ILO specialists and support staff in ROAS and Geneva. The objective of the consultation is to reach a common understanding regarding the status of the project, the priority assessment questions, available data sources and data collection instruments and an outline of the final assessment report. The following topics will be covered: status of logistical arrangements, project background and materials, key evaluation questions and priorities, outline of the inception and final report.

Following the initial briefing, the desk review and the inception report, the missions will include meetings with constituents/stakeholders together with interpreters supporting the process.

### Individual Interviews and/or Group Interviews:

Individual or group interviews will be conducted with the following:

1. Project Staff
2. ILO ROAS: Decent Work Team Senior Gender Equality Specialist; Decent Work Team Senior Workers' Specialist; Regional Programme Service; Deputy Regional Director
3. ILO Headquarters technical departments
4. Donor representatives
5. Interviews with national counterparts (government, public institutions, social partners, IPs, etc.)
6. Interviews with direct and indirect beneficiaries
7. Representatives of the regional organisations of ITUC and GUFs
8. Other donor agencies working in the relevant fields

### Debriefing:

Upon completion of the missions, provide a debriefing to the Project teams, ILO DWT and HQ on the evaluation findings, conclusions and recommendations. The evaluator will also debrief stakeholders to validate results.

The draft report will subsequently be shared with ILO ROAS, and constituents for comments.

The ILO evaluation guidance and checklists will serve as guide for all stages of the evaluation.

## **Main deliverables:**

1. Inception report
2. Stakeholder debrief and PowerPoint
3. Draft evaluation report
4. Final evaluation report with executive summary

DATA COLLECTION PLAN

EVALUATION QUESTIONS	INDICATOR	SOURCES OF DATA	METHOD
<b>1. Relevance:</b>			
a. How does the project approach fit the on-going trends and patterns of workers issues in the selected countries?	Approach remains relevant to trends of workers issues	<ul style="list-style-type: none"> <li>- Original and revised project proposals.</li> <li>- Workers' Representatives.</li> <li>- ILO Specialists</li> </ul>	Desk review Interviews
b. How do the project objectives fit under the ILO Decent Work Country Programmes for countries where it exists and broader development frameworks (UNDAF)?	Relevance of project objectives to DWCP and development frameworks	<ul style="list-style-type: none"> <li>- Original and revised project proposals.</li> <li>- DWCP and UNDAF documentation</li> </ul>	Desk Review
c. How do the project objectives respond to donor priorities in the countries targeted?	Relevance of project objectives to donor priorities	<ul style="list-style-type: none"> <li>- Original and revised project proposals.</li> <li>- Donor policy documents</li> </ul>	Desk review Interviews
d. How did the intervention's design and implementation contribute (or not) toward the ILO goal of gender equality, international and regional gender equality conventions, and national gender polices and strategies?	Contribution of project towards ILO's gender policies	<ul style="list-style-type: none"> <li>- Original and revised project proposals.</li> <li>- Project reports</li> <li>- ILO Gender Equity Specialist</li> <li>- Workers' Representatives</li> </ul>	Desk review Interviews
e. Are the project objectives aligned with tripartite constituents objectives?	Relevance of project objectives to tripartite constituents	<ul style="list-style-type: none"> <li>- Representatives of governments, employers and workers' organisations</li> </ul>	Interviews
<b>2. Validity of design:</b>			

EVALUATION QUESTIONS	INDICATOR	SOURCES OF DATA	METHOD
a. Is the project strategy and structure coherent and logical (what are logical correlations between objective, outcomes, and outputs);	Coherent and logical correlation between objectives, outcomes and outputs	- Original and revised project proposals.	Desk review
b. Were project assumptions realistic; Did the project undergo a risk analysis and design readjustment when necessary? - In what ways did the project adjust its strategy based on the recommendations of the midterm evaluation?	Realistic project assumptions and adjustments to strategy	- Original and revised project proposals. - Mid-term evaluation report	Desk review
<b>3. Effectiveness:</b>			
a. Has the project achieved the planned objectives? (analysis of achievements and challenges by outcome is required) In cases where challenges were faced, what intermediate results can be reported towards reaching the outcomes?	Successful outcomes or intermediate results	- Original and revised Monitoring and Evaluation Plans - Project reports - Project staff	Desk review Interviews
b. To what extent did the project build synergies with national initiatives and with other donor-supported projects?	Synergies with other initiatives and projects	- Project reports - National and regional counterparts and stakeholders	Desk review Interviews
c. What, if any, alternative strategies would have been more effective in achieving its objectives?	Alternative strategies identified	- Workers' representatives	Interviews
d. How well did the project respond to the mid-term evaluation recommendations?	Revisions to project design after mid-term evaluation	- Mid-term evaluation report - Revised project proposal	Desk review

EVALUATION QUESTIONS	INDICATOR	SOURCES OF DATA	METHOD
e. Does the project make use of monitoring and evaluation framework? Were data collection and monitoring used as per the recommendations of the midterm review?	Effective use of monitoring and evaluation framework	<ul style="list-style-type: none"> <li>- Original and revised Monitoring and Evaluation Plans</li> <li>- Project reports</li> </ul>	Desk review
<b>4. Effectiveness of management arrangements:</b>			
a. Were the management arrangements effective?	Effective management arrangements	<ul style="list-style-type: none"> <li>- Project team</li> <li>- ACTRAV</li> <li>- Project Steering Committee</li> </ul>	Desk Review Interviews
b. Has the project received adequate technical and administrative support from the ILO departments and units?	Adequate technical and administrative support	<ul style="list-style-type: none"> <li>- Project team</li> <li>- ACTRAV</li> <li>- Project Steering Committee</li> </ul>	Desk Review Interviews
<b>5. Efficiency:</b>			
a. To what extent have project activities been cost-effective?	Value to project beneficiaries compared with other possible activities	<ul style="list-style-type: none"> <li>- Project budget</li> <li>- Project team</li> <li>- Analysis of outcomes of activities</li> </ul>	Desk Review Interviews
b. To what extent has the project been able to build on other ILO or national/regional initiatives and create synergies in cost sharing?	Cost-sharing with other initiatives	<ul style="list-style-type: none"> <li>- Project team</li> <li>- Budgets</li> </ul>	Desk Review Interviews
<b>6. Impact orientation:</b>			
a. What is the likely contribution of the project initiatives, including the innovative approaches and methodologies piloted, to stated development objective?	Contribution of project activities to overall development objectives	<ul style="list-style-type: none"> <li>- Original and revised project proposals.</li> <li>- Project reports</li> <li>- Beneficiary organisations</li> </ul>	Desk Review Interviews

EVALUATION QUESTIONS	INDICATOR	SOURCES OF DATA	METHOD
<b>7. Sustainability:</b>			
a. Are project achieved results likely to be sustainable? What measures have been considered to ensure that the key components of the project are sustainable beyond the life of the project?- How will activities and/or management structures be financed when the project ends?	Extent to which successful outcomes are likely to be sustained and resourced beyond the life of the project, without further external financial input or technical support.	<ul style="list-style-type: none"> <li>- Project Reports</li> <li>- Workers' Representatives.</li> <li>- ILO Specialists</li> <li>- Project team</li> </ul>	Desk Review Interviews
<b>8. Lessons learned:</b>			
a. What good practices can be learned from the project that can be applied to similar future projects/second phase?	Good practices identified	<ul style="list-style-type: none"> <li>- Project Reports</li> <li>- Workers' Representatives.</li> <li>- ILO Specialists</li> <li>- Project team</li> </ul>	Desk Review Interviews
b. To what extent are the good practices documented and shared with the broader community?	Dissemination of good practice documentation	<ul style="list-style-type: none"> <li>- Project reports</li> <li>- Project team</li> </ul>	Desk Review Interviews

## DOCUMENTS REVIEWED

- Project Proposal (July 2011)
- Project Revision Form
- Quarterly Progress Reports (12)
- Final Mid-Term Report and Appendices
- Monitoring & Evaluation Plan (Revised)
- Table of Activities
- List of Publications
- Expert Database
- USDOS Grant Waiver Request
- F Indicators
- Cost Extension – Logframe updates
- Decent Work Country Programmes / UNDAF (Jordan, Oman, Lebanon, Palestine, Yemen)
- Report: Project Advisory Committee (April 2013)

## EVALUATION SCHEDULE

2-3, 5 March	Desk Review
13 March	Meeting with Evaluation Manager
16-20 March, Beirut	Interviews with ROAS staff, field visits to partner organisations and project participants
22-23 March, Amman	Field visits to partner organisations and project participants
24 March, Muscat	Field visits to partner organisations and project participants
25 March, Bahrain	Field visits to partner organisations and project participants
2 April	Debrief to Evaluation Manager and project team
10 April	Presentation of Draft Report

## OUTLINE OF FINAL EVALUATION REPORT

1. Title page
2. Table of Contents, including List of Appendices, Tables
3. List of Acronyms or Abbreviations
4. Executive Summary
5. Project background (historical background, context, intervention logic, implementation)
6. Evaluation background and Methodology (purpose, scope, work plan, limitations)
7. Activities and outputs (Status of outcomes)
8. Answers to evaluation questions for each criteria
9. Conclusions
  - a. Overall assessment (based on answers to evaluation questions)
  - b. Lessons learned
  - c. Recommendations (focusing on i) maximizing impact and ensuring sustainability and ii) further interventions)
10. Annexes



## Appendix VII: Persons Interviewed

<b>ILO</b>		
Mr Frank Hagemann	Acting/ Regional Director	ILO-ROAS
Ms. Nathalie Bavitch	Regional M&E Officer	ILO-ROAS
Mr Torsten Schakel	Regional Labour Standards Specialist	ILO-ROAS
Mr Mustapha Said	Senior specialist in Workers' Activities	ILO-ROAS
Mr Nabil Abdo	National Officer ('Literacy Project')	ILO-ROAS
Mr Abid Briki	Chief Technical Advisor ('Literacy Project')	ILO-ROAS
Mr Rabee Fakhri	National Officer ('Literacy Project')	ILO-ROAS
Ms. Hélène Harroff-Tavel (Skype)	Labour Migration Branch	ILO-MIGRANT
Ms Rabia Jalloul	National Programme Officer	ILO-ROAS
Mr Jean Francois Klein (Skype)	Former Head, Regional Programme Service (RPS)	ILO-PROGRAM
Ms Emanuela Pozzan	Senior Regional Specialist (Gender Equality)	ILO-ROAS
Mr Andrea Salvini	Chief Technical Advisor (MAGNET)	ILO-ROAS
<b>Lebanon</b>		
Mr Fateh Azzam	Director	Asfari Institute for Civil Society and Citizenship, Beirut
Ms Rose	Vice-Secretary	Domestic Workers Union
Mr Afif Younes	Committee member	VAL Workers Union
Mr Samir Taouk		retail workers union
Mr Castro Abdallah	President	FENASOL
Mr Isamel Badran	Media consultant	CGTL
Ms Samira Trad		Frontiers Ruwad Association
Mr Walid Hamdan (Skype)	Former ILO-ACTRAV Desk Officer for Arab States	ITUC
<b>Oman</b>		
HE Hamad bin Khamis Al-Amri,	Undersecretary	Ministry of Manpower,
Mr Abdulla Murad Al-Mullahi	Director of International Organisations & Foreign Relations	Ministry of Manpower
Mr Saeed Saleh Saeed Al-Kiyumi	Chairman	Oman Chamber of Commerce & Industry
Mr Nabhan Ahmed Mohammed Al-Battashi	Chairman	GFOTU
Mr Isehaq Juma Hamood Al-Kharusi	Deputy Chairman	GFOTU
Ms Aida Shamees Zaid Al-Hashmi	Head, Committee of Working Women	GFOTU
Mr Abdulla Moosa Ali Al-Huseini	Head of Councils and Committees	GFOTU
3 Trainers		GFOTU
<b>Bahrain</b>		
Mr Mohammad Mahdi	Assistant General Secretary	GFBTU
Mr Hassan Abdulla Al-Halwachi	Chairman (and project trainer)	Bahrain National Gas Company Union
Mr Juma Ali Ahmed Al-Binkalil	Secretary-General	GFBTU
Mr Salman Jafeer Al-Mahfoodh	President	GFBTU
Ms Suad Mohammed Mubarak	Assistant General Secretary (and project trainer)	GFBTU
	President	ASRY Trade Union
<b>Jordan</b>		
Reem Aslan		SADAQA
Mr Khaled Hababbeh	International Relations Officer	GFJTU
Mr Ali Falah Al-Hadid	President	General Trade Union for Workers in Electricity, Jordan
Mr Ahmad Awad	Director / Jordan Labor Watch	Phenix Centre
Mr Azzam Somadi	President	JFITU
5 Trainers		JFITU
Mr Mustapha Tlili	Executive Secretary	ATUC
<b>Occupied Palestinian Territories</b>		
Mr Hussien Foqaha (Skype)		PGFTU
<b>Yemen</b>		
Mr Fadel Akel (Skype)		GFYTU

## Appendix VIII: Bibliography

### Documents reviewed prior to field visits

- Project Proposal (July 2011)
- Project Revision Form
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- F Indicators (U.S. Dept. of State)
- Cost Extension – Logframe updates
- Decent Work Country Programmes / UNDAF (Jordan, Oman, Lebanon, Palestine, Yemen)
- Report: Project Advisory Committee (April 2013)

### Additional documents collected during and subsequent to field visits:

- Overview of the Regional Workers Literacy Project, Abid Briki presentation to Project Advisory Committee (March 2015)
- List of Knowledge Products
- English-language summaries of “Workers’ Perspectives” thematic briefs:
- Minimum Wage is a Developmental Tool
- Taxes
- Financial and Economic Crisis
- Macroeconomic Policies
- Labor Watch, Freedom of Association in Jordan, May 2012.
- Labor Watch, Labor Protests in Jordan, March 2014.
- ILO project video (2015).