



Enhancing Freedom of Association among Emerging Trade Unions

**Phenix Center for Economic and
Informatics Studies**

Summative Evaluation

August 2018

August 28, 2017

USAID CIS Project No.: 3253-2302

This publication was prepared independently for the USAID Civic Initiatives Support Program, implemented by FHI 360 in Amman, Jordan. The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

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PROJECT SUMMARY

Project Name: “Enhancing Freedom of Association among Emerging Trade Unions”

Strategic Objective: To enhance the role of the newly established trade unions in democratic processes and transition through building their capacities to be efficient, effective and democratic. In addition, the project aims to enhance trade unions’ right to association by advocating for constitutional changes and revising the law

Life of the Project:

Phase I: July 01, 2014 – December 31, 2014 (6 months)

Phase II: December 1, 2015 – March 30th 2018 (28 months)

Implementing Partner:

The Phenix Center for Economic and Informatics Studies, Amman, Jordan.

Grant ID:

Phase I: DRG-02-Phenix-3253-2302

Phase II: DRG-02-Phenix-3253-2302-PII

Project Funding:

Phase I: JOD 54,035.01

Phase II: JOD 181,211.78

This report describes the findings of the summative evaluation for the shared understanding of the Phenix Center and USAID CIS as approved by USAID CIS. It covers both projects undertaken in 2014 and 2016-18. The report includes what was evaluated, the methodology used, and the plan of work conducted in conformance with the USAID CIS evaluation scope of work (SOW). During the design of the evaluation and preparation of this report, extensive discussions took place with the Phenix Center and USAID CIS which provided the evaluation consultant with the opportunity to clarify key aspects of the contribution to the “right of association”.

ACRONYMS

CSO	Civil Society Organization
CSP	Civil Society Program
FGD	Focus Group Discussions
GFJTU	General Federation of Jordanian Trade Unions
ITU	Independent Trade Union
JFITU.	Jordanian Federation of Independent Trade Unions
KII	Key Informant Interviews
SoW	Scope of Work
UPR	Universal Periodic Review
USAID	U.S. Agency for International Development
USAID CIS	USAID Civic Initiatives Support Program

EXECUTIVE SUMMARY

يتناول هذا التقرير نتائج التقييم الذي أجري بتكليف من قبل برنامج USAID لدعم مبادرات المجتمع المدني في الأردن، والممول من الوكالة الأميركية للتنمية الدولية، حول مشروع تعزيز الحرية النقابية في النقابات العمالية الناشئة والذي نفذته مركز الفينيق للدراسات الاقتصادية والمعلوماتية. وقد تم تكليف الباحثة زينة الحلو بإجراء هذا التقييم وكتابة التقرير المرفق.

يشكل هذا الملخص التنفيذي موجزاً لأهم النتائج التي خلص إليها البحث التقييمي والذي شمل 13 مقابلة معمقة مع رؤساء ورئيسات النقابات المستقلة، ومدير مركز الفينيق، ومقرر لجنة العمل والتنمية الاجتماعية في البرلمان الأردني ومسؤولة قضايا المرأة في المشروع بالإضافة إلى معدة البرنامج الإذاعي الذي تم انتاجه كجزء من هذا المشروع. كما التقت الباحثة بعدد من القيادات النقابية من مختلف النقابات المستقلة وفي ثلاث مناطق هي عمان في الوسط ومنطقة الأغوار الشمالية وإربد في الشمال، وذلك ضمن 11 مجموعة تركيز شملت العاملين في مركز الفينيق والمدربين، والنقابيين المنتمين حديثاً والعاملين في برنامج USAID لدعم مبادرات المجتمع المدني للوقوف عند آرائهم وآرائهن حول تنفيذ المشروع ومدى تحقيق الأهداف.

كما تم الاطلاع على الوثائق المرتبطة بالمشروع ومنها خطة العمل ووثيقة المشروع الأساسية، ووثائق الإدارة والتنفيذ، والمواد التدريبية ومنشورات مركز الفينيق والتقارير الفصلية حول سير عمل المشروع.

اهداف التقييم

هدف العمل الى تقييم اداء مركز الفينيق حول تحقيق الاهداف والنتائج المرجوة المدرجة في اطار نتائج المشروع، بالإضافة الى تقييم فعالية مسار ومنهجية عملية المدافعة وعناصرها (الابحاث، بناء القدرات والتأوير) ومدى مساهمة هذه العناصر في تحقيق نتائج المدافعة. هدف التقييم ايضاً الى فهم مدى تطبيق مركز الفينيق للنهج المبني على حقوق الانسان ودمج النوع الاجتماعي في ادارة المنحة ومسار التنفيذ، وفهم التحديات التي واجهت فريق البرنامج خلال التنفيذ، على أن يخلص التقييم الى تقديم اقتراحات بخصوص الانجازات والتطرق الى الفجوات والتحديات في حال اعادة التنفيذ.

مقدمة حول الواقع الأردني

المملكة الأردنية الهاشمية هي دولة صغيرة في الشرق الأوسط يبلغ عدد سكانها 6.5 مليون نسمة¹. يعتبر النظام الأردني ملكي دستوري بموجب دستور 1952، ولكن تم إدخال تعديلات دستورية في عام 2016 تمنح الملك سلطات إضافية، ليحل مكان "النظام البرلماني مع نظام ملكي رئاسي - وهو مزيج من الأنظمة الرئاسية والملكية"². من حيث حقوق الإنسان والحرية العامة، وقع الأردن على عدد من الاتفاقيات الدولية لحقوق الإنسان، ويخضع بانتظام للمراجعة الدورية الشاملة (UPR) لمجلس حقوق الإنسان التابع للأمم المتحدة، حيث يتم إصدار سلسلة من التوصيات تلزم الحكومة بمزيد من التقيد بمبادئ حقوق الإنسان والحرية العامة. وعلى الرغم من أن الحكومة الأردنية تقوم على ما يبدو ببذل الجهود لإتباع هذه التوصيات كما ورد في تقارير المراجعة الدورية الشاملة، إلا أنه ما زال هناك الكثير من الجهود التي يجب بذلها، خاصة في مجال حرية التجمع وتكوين الجمعيات على النحو التالي³:

118.69. ضمان احترام التشريعات للمادتين 19 و 21 من العهد الدولي الخاص بالحقوق المدنية والسياسية، والتي تكفل حرية التعبير وحرية تكوين الجمعيات والتجمع (إسبانيا) ؛ p.13
118.81. اتخاذ تدابير للسماح بعقد اجتماعات عامة سلمية بحرية، وتجنب استخدام التهم المسيسة والمصطلحات الغامضة التي تمنع المواطنين من ممارسة حريتهم في التجمع وتكوين الجمعيات (المكسيك) ؛

¹ بي بي سي نيوز ، ملف الأردن ، متاح على <https://www.bbc.co.uk/news/world-middle-east-14631981> آخر دخول 18 يوليو 2018

² سفيان عبيدات ، "التعديلات الدستورية لعام 2016 في الأردن: عودة إلى الملكية المطلقة؟" دستورنت ، المعهد الدولي للديمقراطية ومساعدة الانتخابات IDEA ، 27 مارس 2016 ، متاح على <http://www.constitutionnet.org/news/jordans-2016-constitutional> -التعديلات-العودة-الملكية المطلقة آخر الوصول 26 يوليو 2018

³ المراجعة الدورية الشاملة ، الأردن ، الدورة الثانية ، الدورة السابعة عشرة ، 2013 ، متاحة على <https://www.ohchr.org/EN/HRBodies/UPR/Pages/JOindex.aspx> آخر دخول 29 يوليو 2018

119.12. اتخاذ تدابير لتهدئة بيئة تمكيدية للمجتمع المدني، بما في ذلك عن طريق تعديل قانون الجمعيات لإزالة القيود المفروضة على إنشاء منظمات المجتمع المدني، بما في ذلك تعيين موظفي الدولة لمنظمات المجتمع المدني المنشأة حديثاً، وإزالة شرط موافقة مجلس الوزراء على التمويل الأجنبي لمنظمات المجتمع المدني وأي قيود أخرى غير ضرورية من قبل الحكومة عليها (كندا) ؛ p.14

وبشكل أكثر تحديداً ، فإن التقرير الوطني حول ممارسات حقوق الإنسان لعام 2017 الصادر عن وزارة خارجية الولايات المتحدة ، مكتب الديمقراطية وحقوق الإنسان والعمل ، يتطرق إلى القيود المفروضة على إنشاء نقابات عمالية جديدة ما لم توافق عليها وزارة العمل ويتطلب ما لا يقل عن 50 عضواً مؤسساً. كما يبرز التقرير غياب الحق في المساومة الجماعية رغم أن قانون العمل ينص على اتفاقات جماعية⁴.

على الرغم من أن الحركة العمالية في الأردن عرفت لحظات مجيدة في الخمسينيات وأوائل الستينيات حيث أصبحت "نشطة بشكل متزايد بشأن قضايا العمل والشؤون السياسية على المستويين الوطني والإقليمي"⁵، فإن عدد النقابات العمالية "الرسمية" في الأردن - أي تلك المعترف بها من قبل الحكومة - هو 17 منذ عام 1976. يبدو أن النقابات العمالية واتحادها العام أي الاتحاد العام لنقابات العمال الأردني الذي تأسس في عام 1954 يفتقر إلى حد كبير إلى الممارسات الديمقراطية الداخلية ولا يسمح بتجديد النخب القيادية. كما أصبحت مواقفهم متساهلة مع الحكومة ، مما أدى إلى "محدودية الاستقلالية" بينما أدت "شرعية الحركة النقابية المعترف بها رسمياً" إلى "فقدان المصداقية" ، إلى جانب انخفاض عدد أعضاء النقابة الذين أصبحوا يشكلون بشكل متزايد في قدرة النقابات على الدفاع عن حقوقهم والدعوة إلى تحسين ظروف العمل والمعيشة⁶.

تجدر الإشارة في هذا السياق إلى أن الحكومة الأردنية قد صادقت على معظم الاتفاقيات التي تدرج تحت إعلان منظمة العمل الدولية بشأن المبادئ والحقوق الأساسية في العمل، كما يضمن الدستور الأردني حرية تكوين الجمعيات، وذلك بموجب المواد التالية⁷:

المادة 16 - الفقرة 2: يحق للأردنيين إنشاء جمعيات وأحزاب سياسية بشرط أن تكون أغراض هذه الجمعيات والأطراف مشروعة ، وأن تكون أساليبها سلمية ، وأنظمتها الداخلية لا تتعارض مع أحكام الدستور. المادة 16 - البند 3: ينظم القانون إنشاء الجمعيات والأحزاب السياسية ومراقبة مواردها المادة 23- الفقرة 3 و: يجوز تشكيل نقابات العمال الحرة في حدود القانون.

ومع ذلك ، لم تبدأ حركة نقابية مستقلة في الأردن إلا في العام 2006، عندما "شكل العشرات من العمال الميوليين في القطاع الزراعي العام لجنة مستقلة ، وأطلقوا من خلالها حملة احتجاجات للمطالبة باستقرار وظيفي أكبر ورواتب أعلى وظروف عمل أفضل . كما تم تشكيل نقابات عمالية مستقلة أخرى في السنوات التالية ، لكنها ما زالت غير معترف قانونياً بها حتى الآن . ويبلغ عدد النقابات المستقلة في الأردن اليوم 12 نقابة مهنية جديدة ومستقلة من مختلف القطاعات ، بما في ذلك الزراعة والصناعة والخدمات العامة . تم تشكيل بعضها من قبل العمال في المؤسسات المملوكة للحكومة كما اتحدت هذه النقابات العمالية المستقلة في إطار الاتحاد الأردني لنقابات العمال المستقلة، ومع ذلك ، لا تزال هذه النقابات ، وكذلك الاتحاد ، ممنوعة من موافقة وزارة العمل على النحو المنصوص عليه في الدستور . وبالتالي، فمن النادر أن يُعترف بها كممثل شرعي لأصحاب العمل ، ما يصعب الدخول في أي حوارات أو مفاوضات جماعية لصالح حقوق العمال . وبالتالي فإن وضعهم غير الرسمي يضعهم في موقف ضعيف إلى حد ما ويحد من قدرتهم على التأثير . من خلال عملية التقييم وجمع المعلومات الأولية ، تحدث الشركاء المعنيون من مختلف النقابات المستقلة عن التخويف المباشر والأعمال الانتقامية على خلفية الانتماء إلى النقابات المستقلة والنشاط فيها، حيث يعاني الكثير من هؤلاء من النقل التعسفي والضغط والإكراه من أجل الحد من نشاطهم وتقييد التزامهم بالحركات النقابية.

أهمية المشروع

⁴ لتقارير الوطنية عن ممارسات حقوق الإنسان لعام 2017 وزارة خارجية الولايات المتحدة ، مكتب الديمقراطية وحقوق الإنسان والعمل ، الأردن ، متاحة على <https://www.state.gov/documents/organization/277493.pdf> آخر دخول 27 يوليو 2018.

⁵ حمد عوض ، "النهج الأردني المتناقض لنقابات العمال" لعام 2017 ، متوفر على <http://www.rosaluxemburg.ps/wp-content/uploads/2017/09/Final-EDITED-Workers-Rights-Struggle-August-2017.pdf> آخر ملف pdf تم الوصول إليه في 28 يوليو 2018

⁶ المرجع نفسه

⁷ دستور المملكة الأردنية الهاشمية ، متاح على <http://www.refworld.org/pdfid/3ae6b53310.pdf> آخر دخول 30 يوليو 2018

ان مشروع "تحسين حرية التجمع ضمن النقابات العمالية الناشئة" المنفذ من قبل مركز الفينيق هو من الأهمية بمكان لحاجات النقابات المستقلة. ان قدرات ومكانة النقابات المستقلة محدودة وغير مطورة، لذلك، فان التركيز على بناء قدراتهم وتطوير مهاراتهم هو مفتاح اساس خاص مع وجود معطيات أن المشروع احدث تغييرات ايجابية في مكانة النقابات المستقلة. ان اعتماد مركز الفينيق مقارنة ذات ابعاد ثلاثة- التدخل لبناء القدرات وانتاج المعرفة وجهود الترويج بما فيها الاعلام - هو اساسي ومنهجي وقابل لتحقيق نتائج مباشرة. يذكر أن مكون الحشد لم يتحقق كما كان مخططاً لأن مركز الفينيق تعرض للكثير من المضايقات من قبل الحكومة وأجهزة المخابرات، ولم يستطع تنفيذ كافة أنشطة المشروع كما تم تصميمها في الأصل.

وقد اظهر مركز الفينيق مستوى عالٍ من الاستجابة في التأقلم مع التحديات المستجدة خلال عملية التطبيق، لاسيما في إيجاد مساحة لإقامة التدريبات بعد منعهم من إقامة هذه التدريبات في فنادق عمان.

من ناحية التنفيذ والتطبيق، يمكن القول إن النشاطات والمخرجات والمحصلات الناتجة عن تنفيذ هذا المشروع مترابطة فيما بينها بشكل وثيق، كما أن ان جميع النقابيين والنقابيات الذين تمت مقابلتهم راضون جدا عن نتائج المشروع وعن دعم مركز الفينيق والنشاطات المنفذة والنتائج المحققة.

ومع ذلك، فقد أظهر البحث التقييمي أن هناك فجوة إذ كان بالامكان بذل جهد اكبر لتقديم مهارات اساسية في حل النزاعات داخل النقابات والتركيز اكثر على الحوكمة والقيادة النسائية والعنف المبني على النوع الاجتماعي والتكامل بين مختلف مكونات المشروع.

فعالية المشروع

اعتبر المساهمون في كافة مجموعات التركيز والمقابلات أن المشروع كان مفيداً للنقابات المستقلة، إذ كانت التغييرات في السلوك واضحة وبشكل ملحوظ خلال الاجتماعات مع رؤساء النقابات والقيادات النقابية بشكل عام، الذين اعترفوا بانهم كانوا "غير منظمين وبجهلون القواعد الاساسية لنشاطات النقابات ولم يكونوا يعلمون شيئاً عن التفاوض الجماعي والمناقشات". كما أظهر التقييم تحسناً في المهارات المتعلقة بالتواصل والتفاوض الجماعي والمناقشات وآليات والقدرة على تقديم حجج والحشد. وساهم المشروع في اظهار قصص نجاح فردية (معظمهم لرؤساء النقابات المستقلة) وكذلك بعض النساء اللواتي نجحن في قيادة العمل النقابي وكانوا فخورين بما احرزوه من تقدم في الثقة بالنفس والقيادة وتمثيل منظماتهم. كما اظهر النقابيون حماسة شديدة حين طرح المشروع. وقد اثني المدربون والمساهمون في المشروع على التغييرات المعرفية والسلوكية للنقابات المستقلة، باستثناء عضو البرلمان الذي اعتبر أن اساليب المفاوضة التي اعتمدها اعضاء النقابات المستقلة اثناء المناقشات حول قانون العمل لم تكن واقعية إذ أمعن النقابيون في رفض التنازلات ولم يتم مفاوضاته بشكل جيد وبناء.

وقد أجمع الشركاء المعنيين على أن المشروع قد ساهم بشكل واضح في تقوية البنية العامة للحركة النقابية الناشئة، وأن ذلك بدى واضح بشكل خاص في فهم المعايير والالتزامات الدولية وفي التشريعات الاردنية المساندة للحق في التجمع وتأسيس النقابات، كما ساهم المشروع في تقوية مهارات القيادة والتفاوض الجماعي.

من ناحية أخرى، بقي اثر المشروع محدوداً بالنسبة الى بناء قدرات النقابات المستقلة في مهارات التواصل والاعلام، على حد اعتبار المدربين وبعض النقابيين أنفسهم، في حين أن البعد المتعلق بالنوع الاجتماعي والمساواة بين الجنسين قد لُحظ تقدماً مهماً، خاصة من خلال إقرار مبدأ الكوتا مجالس إدارة النقابات المستقلة، مما أدى الى تولي ثلاث سيدات قيادة نقاباتهم، إلا أن ذلك لم يترجم دوماً بالتزام أكبر بقضايا المرأة والمساواة وذلك بسبب الذهنية الذكورية المهيمنة والتقسيم التقليدي للأدوار الاجتماعية بين المرأة والرجل، على حد تعبير النقابيات أنفسهن، وكذلك المسؤولية عن مكون النوع الاجتماعي ضمن المشروع.

بالنسبة الى التدريبات، فقد كانت بنية التدريب مفيدة جدا في إحداث تغييرات ايجابية. وساهمت التمرينات التي تبتعثها جلسات التدريب وكذلك الدعم المستمر من قبل إدارة مركز الفينيق، في بناء مهارات متعددة للنقابات ما يمكنهم من لعب دور ريادي في الحركة النقابية، إذ جاء على لسان أحد النقابيين إن المشروع قد "خلق قيادات نقابية قوية".

بالإضافة الى ذلك، فقد اثار المشروع وعيا بين النقابيين وشجع بشكل غير مباشر في عملية الحشد. وفي الكثير من الحالات حقق النقابيون انتصارات خلال فترة المشروع مثل تحصيل بعض الحقوق للعمال، الامر الذي شجع على الحشد وعلى استقطاب اعضاء جدد. ولكن قنوات التواصل بين النقابات بقيت ضعيفة ولم يتم التداول بشكل واسع في الانجازات المحققة، ما يجعلها مجهولة من قبل أكثرية النقابيين، خاصة من هم من خارج النقابة نفسها.

وقد كان للمقاربة الترويجية التي اعتمدها المشروع فعالية نسبية في تحسين مشاركة المرأة في النقابات. لكن الخوف بقي مسيطرا في الدوائر النسائية اكثر منه في دوائر الرجال خاصة فيما يتعلق بالوضع "غير القانوني" للنقابات. اضافة الى ذلك تستمر الممارسات الذكورية داخل النقابات، مما يؤدي الى عزوف النساء عن المشاركة الفاعلة داخل النقابات التزاماً أو

خوفاً من التقاليد المجتمعية، ما يعيق مشاركة المرأة وذلك رغم الالتزام بالكويتا النسائية ومبادئ المساواة بين الجنسين المعتمدة في تنفيذ المشروع.

ومع ذلك، فقد ساهم المشروع في كسر حاجز الخوف عند النقابيين والنقابيات، فخاض الرجال والنساء معاً غمار العمل النقابي المستقل وطالبوا بحقوقهم مما أغنى النقاش العام في التشريعات ذات الصلة. لكن الحوارات وورش العمل بين المساهمين كانت محدودة وثنائية بمعظمها ضمت النقابات المستقلة وأرباب العمل أو القطاع الحكومي، كما أن الحكومة وأرباب العمل لم يعترفوا بهذه المجموعات على أنها نقابات مستقلة بل اعتبرتها مجموعات غير رسمية من العمال.

خلال فترة تنفيذ المشروع، لم تطرأ أية تغييرات على قانون العمل والنقاش ما زال سارياً في هذا الخصوص. ولكن على الرغم من ذلك، فقد نجح مركز الفينيق في تثبيت نفسه كمرجعية فيما يتعلق بحقوق العمال وقضايا العمل وهو يتمتع بعلاقات جيدة مع أصحاب القرار، الأمر الذي يساهم في استدامة المشروع بعد انسحاب برنامج USAID لدعم مبادرات المجتمع المدني. كما أثبتت نفسها النقابات المستقلة كلاعب أساسي في كل ما يتعلق بحقوق العمال حتى ولو لم يتم الاعتراف بها رسمياً حتى الساعة.

استمرارية المشروع

من المتوقع أن تستمر فوائد البرنامج بعد انتهاء المشروع، وذلك بسبب التزام مركز الفينيق بقضايا العمل وحقوق العمال التزاماً مطلقاً مبدئياً غير مرتبط بتنفيذ مشاريع أو تمويل برامج. كما تنتظر النقابات المستقلة إلى مركز الفينيق على أنه شريك استراتيجي وداعم مهم لقضيتهم. في الواقع فإن معظم المساهمين الذين تمت محاورتهم لم يتمكنوا من تحديد تاريخ بدء أو انتهاء المشروع، ما يظهر أن الدعم كان مستمراً من حين بدء النقابات المستقلة بالظهور. من المهم الإشارة إلى أن الدعم بقي مستمراً خلال فترة التقييم التي امتدت لفترة شهرين إلى ثلاثة أشهر بعد انتهاء المشروع رسمياً.

خلص التقييم إلى أن التغييرات الملحوظة في المعرفة والمفاهيم والسلوك على مستوى رؤساء النقابات والقيادات النقابية بشكل عام مستدامة وراسخة. إذا كان من الواضح من خلال الحوارات أن المشروع قد أدخل تغييرات بنوعية على المستوى الفردي والمستوى المؤسسي داخل النقابات، والتي من المتوقع أن تدوم إلى ما بعد انتهاء المشروع. فعلى سبيل المثال، قد تم تغيير القيادات النقابية في بعض النقابات من دون أي مشاكل في تداول السلطة أو شرعية التمثيل، كما أن مقاربة المطالب الخاصة لإصلاح النظم والقوانين اضحت أكثر منهجية وتنظيماً.

إضافة إلى ذلك، ساهم المشروع في تمكين النقابات المستقلة من إرساء نظم داخلية وقواعد قانونية. وقد ثبت حتى الآن أن هذه القواعد هي ديمقراطية إلى حد كبير تنتج مع الوقت تداول للسلطة في مراكز قيادة عدد من النقابات. ولكن ظهور بعض المشاكل ذات العلاقة بقيادة اتحاد النقابات المستقلة قد يشكل مخاطر في المستقبل يجب التنبيه لها.

توفر مخرجات المشروع، لاسيما الأوراق البحثية والملخصات السياسية (أوراق السياسات) قاعدة متينة وغنية يمكن استخدامها لبدء حوار فعال وبناء مع الحكومة ومع أصحاب القرار. ولكن النقابات لا علم لها حتى الآن بخطط العمل هذه كما أن خطط العمل تلك صعبة الصياغة وليست سهلة الاستخدام من قبل قادة النقابة.

يبين الرسم البياني أدناه أبرز نقاط القوة للمشروع والمجالات حيث يجب التركيز بشكل أدق، كما يعرض الفجوات الأساسية التي يجب معالجتها.

التركيز على النواقص	القيام ببعض التحسينات الموضعية	الاستثمار في الانجازات
<ul style="list-style-type: none"> • معالجة القضايا المتعلقة بالنوع الاجتماعي وتعزيز مفاهيم وممارسات المساواة والعنف المبني على النوع الاجتماعي • خلق بيئة ملائمة لوصول المرأة الى المراكز القيادية • بناء قدرات النقابات المستقلة على الحوكمة وحل النزاعات والديمقراطية 	<ul style="list-style-type: none"> • العمل على بناء التحالفات بين القطاعات وإقامة علاقات تعاون وتواصل وثيق فيما بين النقابات المستقلة • العمل على التطوير المؤسسي لمركز الفينيق • الاستمرار في الضغط من أجل إحداث تغييرات في المناخ العام لحقوق العمال 	<ul style="list-style-type: none"> • المشروع ذو أهمية قصوى ويتطرق الى قضية جوهرية من قضايا حقوق الانسان والعمال • أحدث المشروع تغييرات إيجابية في المعرفة والمقاربة والسلوك لدى النقابات المستقلة • أصبحت النقابات المستقلة بمثابة محاور بحكم الأمر الواقع أساسي للأرباب العمل وللحكومة أحياناً

التوصيات

الاستثمار في الانجازات

توسيع العضوية ومساهمة النقابات المستقلة الحالية، وتأسيس قاعدة صلبة من المعرفة وثقافة عامة من الحراك السلمي المبني على الحقوق قبل الانتقال الى نقابات اخرى. تتمتع النقابات المستقلة ومعها مركز الفينيق بمكانة مميزة لتروج لدى وزارة العمل ولاعبين آخرين معنيين بتحسين حرية التجمع، من اجل اقرار التشريعات المناسبة.

تصميم النشاطات الحالية وازافة نشاطات جديدة بهدف تحسين العضوية، من خلال تدريبات تقنية دورية مفتوحة للمتسبين الجدد او اقامة فرق محورية من المدربين داخل النقابات مهمتها القيام بهذا الدور التوجيهي بشكل دوري داخل النقابات.

تكثيف حضور وتعزيز الوضع السياسي/الاجتماعي للنقابات المستقلة، كتسريع عملية الاعتراف الرسمي بينما يتم في ذات الوقت الترويج لحرية التجمع بناء على الالتزامات الدولية للحكومة الاردنية ومبادئ حقوق الانسان.

القيام ببعض التحسينات الموضعية

بناء تحالفات قطاعية مشتركة وإنشاء قنوات دائمة للتواصل وتبادل المعلومات فيما بين النقابات المستقلة، وإشراك جميع أصحاب المصلحة المعنيين في ذلك من خلال عملية تصميم تشاركية ، بحيث تقوم النقابات العمالية بالتواصل فيما بينها بانتظام في دورة للتعليم وتبادل المعلومات والدعم.

توسيع القدرة المؤسسية لمركز الفينيق، ففي حين أن المركز يظهر كمركز أبحاث رئيسي يعمل على قضايا العمل وحقوق العمال بشكل عام، فمن المهم أن يعمل هذا المركز على خطة استدامة مؤسسية وأن ينشط باتجاه ظهور قيادة متوسطة داخل المركز يمكن أن تساهم في تحقيق رسالته ورؤيته. وينبغي أن يشمل ذلك أيضاً تجديدًا جدّيًا لاستراتيجية الاتصالات في المركز لإثبات نجاحهم وإنجازاتهم بشكل أفضل.

الاستناد إلى التغيرات السياسية / الاجتماعية والاقتصادية الحالية لزيادة الجهود المتعلقة بحرية التجمع وحقوق العمال: قد تكون النقابات المهنية المستقلة في الوقت الحاضر فرصة هامة لفرض نفسها وإسماع صوتها ، بالنظر إلى التغيرات الحالية. كما أنه من المهم إجراء تقييم دقيق للحالة وتخطيط أنشطة المدافعة بالتعاون مع أصحاب المصلحة المتعددين.

وضع مواقف سياسة سهلة الاستخدام وبناء ملكية النقابات المستقلة على إنتاج المعرفة، إذ إنه من الأهمية بمكان أن تشعر النقابات المستقلة بالمزيد من الملكية على إنتاج المعرفة وأن تدرك أهمية البيانات المستندة إلى الأدلة وتحليل المعلومات لدعم مواقف السياسة وتعزيز حججها سواء في حالات المفاوضات الجماعية أو عرض قضاياهم ومشاكلهم.

بناء القدرة التنظيمية لإدماج ابعاد النوع الاجتماعي بشكل شامل داخل النشاط النقابي، وتقديم مفهوم النوع الاجتماعي من حيث الإدراك المتبادل والعلاقات والأدوار الاجتماعية، والتصدي للقوالب النمطية بطريقة تساهم في تحولها من خلال دراسة نماذج بديلة.

ويشمل ذلك 1) التصدي لقضايا المساواة بين الجنسين داخل النقابات مثل المضايقات الجنسية التي تواجهها المرأة في مكان العمل، والتي لم يتم إدراجها في الثقافة الداخلية النقابية، و2) ضمان وصول المرأة بحرية الى المناصب القيادية داخل النقابات دون إقصاء أو ممارسة أي ضغوطات أبوية أو ذكورية. بالإضافة إلى ذلك، من المهم للغاية وضع استراتيجية لدمج النوع الاجتماعي وضمان المساواة بين الجنسين محددة للوصول إلى العاملات وتشجيعهن على الانخراط في النقابات العمالية المستقلة، مع مراعاة أساليب التواصل الخاصة بالنساء على أساس الهواجس التي أعربت عنها النساء.

معالجة قضايا ملحة من خلال مقارنة مشتركة بين أساليب حل النزاعات وممارسات الحوكمة. ويمكن أن يساعد ذلك على مواجهة أي مخاطر محتملة داخل النقابات والاتحاد، وكذلك معالجة الصراعات وبناء قدرة النقابات المستقلة على إدارة التوترات والاختلافات على نحو استباقي. وينبغي أيضا إيجاد وتفعيل آليات لمنع أي شخصنة ممكنة لنقابات العمال ، وذلك بطريقة تشاركية وشاملة.

I. INTRODUCTION

The Hashemite Kingdom of Jordan is a small country in the Middle East with a population of 6.5 million⁸. Jordan was promulgated a constitutional monarchy in the constitution of 1952, but constitutional amendments were introduced in 2016 granting the King additional powers, replacing the “parliamentary system of government with a presidential monarchy - a hybrid of presidential and monarchic systems”⁹.

In terms of human rights and public liberties, Jordan is a signatory state of a number of international human rights conventions and is regularly subjected to the Universal Periodic Review (UPR) of the United Nations Council of Human Rights, whereby a series of recommendations are released for the Government to follow for a greater adherence to human rights principles and public liberties. Although the Government of Jordan seemingly deploys efforts to follow these recommendations as reported by various UPR reports, a lot remains to be done, especially in the field of freedom of assembly and association¹⁰ as follows:

118.69. Ensure that the legislation and the State respect articles 19 and 21 of International Covenant on Civil and Political Rights, which guarantee freedom of expression and freedom of association and assembly (Spain); p.13

118.81. Take measures to allow peaceful public meetings to be held freely and avoid using politicized charges and vague terminology which prevent citizens from exercising their freedom of assembly and association (Mexico); p.13

119.12. Take measures to foster an enabling environment for civil society, including by amending the Societies Act to remove the restrictions on the establishment of civil society organizations, eliminate the role of government in civil society organizations, including in appointing State employees to newly established civil society organizations, remove the requirement for Cabinet approval of foreign funding for civil society organizations as well as any other undue restrictions and controls by the Government on them (Canada); p.14

More specifically, the Jordan Country Report on Human Rights Practices for 2017 issued by the United States Department of State, Bureau of Democracy, Human Rights and Labor, reports restrictions on the establishment of new trade unions unless approved by the Ministry of Labor and required by at least 50 founding members. The report also highlights the absence of the right to collective bargaining although the labor code provides for collective agreements¹¹.

Although the labor movement has known glorious moments in the fifties and early sixties whereby it “became increasingly active and vocal on labour issues and political affairs at both the

⁸ BBC News, Jordan Country Profile, available at <https://www.bbc.co.uk/news/world-middle-east-14631981> last accessed 18 July 2018

⁹ Sufian Obeidat, “Jordan’s 2016 constitutional amendments: A return to absolute monarchy?” Constitutionnet, International Institute for Democracy and Election Assistance IDEA, 27 March 2016, available at <http://www.constitutionnet.org/news/jordans-2016-constitutional-amendments-return-absolute-monarchy> last accessed 26 July 2018

¹⁰ UPR of Jordan, Second Cycle, 17th session, 2013, available at <https://www.ohchr.org/EN/HRBodies/UPR/Pages/JOindex.aspx> last accessed 29 July 2018

¹¹ Country Reports on Human Rights Practices for 2017 United States Department of State, Bureau of Democracy, Human Rights and Labor, Jordan, available at <https://www.state.gov/documents/organization/277493.pdf> last accessed 27 July 2018.

national and regional levels”¹², the number of ‘official’ trade unions in Jordan – i.e. recognized by the government - currently stands at 17 since 1976. These trade unions and their umbrella federation, the General Federation of Jordanian Trade Unions (GFJTU) established in 1954 appear to largely lack internal democratic practices and do not allow for the renewal of leading elites. Their positions also became lenient towards the government, leading to “reduced independence” while the compromised “legitimacy of the officially recognized trade union movement” resulted in “a loss of credibility”, along with a decrease in the number of union members who “became increasingly skeptical of the unions’ ability to stand up for their rights and advocate for the improvement of working and living conditions”¹³.

Having said that, it is worth mentioning that the Government of Jordan has ratified most of the conventions which fall under the ILO Declaration on Fundamental Principles and Rights at Work¹⁴. The Jordanian Constitution also guarantees the freedom of association¹⁵:

Article 16 - clause 2: *Jordanians are entitled to establish societies and political parties provided that the objects of such societies and parties are lawful, their methods peaceful, and their by-laws not contrary to the provisions of the Constitution.*

Article 16 - clause 3: *The establishment of societies and political parties and the control of their resources shall be regulated by law*

Article 23- clause 3 f: *Free trade unions may be formed within the limits of the law.*

However, it is only in 2006 that an independent trade union movement started to emerge in Jordan, when “dozens of day labourers in the public agricultural sector formed an independent committee, the Day Labourers Committee, through which they launched a campaign of protests to demand greater job stability, higher salaries, and better working conditions”¹⁶. Other independent trade unions were also formed in the following years, but remain non-recognized until now. They currently account to the number of 12 new and independent trade unions from various sectors, including agriculture, industry, and public services. Some of them are formed by workers in governmentally-owned institutions. These independent trade unions have also united under the Jordanian Federation of Independent Trade Unions (JFITU). However, these unions, as well as the Federation, are still denied the approval of the Ministry of Labor as stipulated by the law. Hence, they are rarely recognized as legitimate interlocutors for employers, therefore cannot engage in any negotiations or collective bargaining in favor of workers’ rights¹⁷. Their unofficial status makes them rather weak and limits their capacity to influence¹⁸. Across the data collection, anecdotes in relation to direct intimidation and work-related reprisals were not uncommon, whereby many suffer from arbitrary displacements, pressure and coercion in order to limit their activism and restrain their commitment to the trade union movements.

¹² Ahmad M. Awad, Jordan’s Paradoxical Approach to Trade Unions” 2017, available at <http://www.rosaluxemburg.ps/wp-content/uploads/2017/09/Final-EDITED-Workers-Rights-Struggle-August-2017.pdf> last accessed 28 July 2018

¹³ Ibid.

¹⁴ Ibid.

¹⁵ The Constitution of The Hashemite Kingdom of Jordan, available at <http://www.refworld.org/pdfid/3ae6b53310.pdf> last accessed 30 July 2018

¹⁶ Ahmad M. Awad, op.cit:

¹⁷ Ibid.

¹⁸ Ibid.

II. DEVELOPMENT PROBLEM AND USAID RESPONSE

The USAID Civic Initiatives Program (CIS) supported a broad range of civic initiatives pertaining to promote government of Jordan and CSO collaboration effort to reach the objective of reform and development in the country. Before the USAID started working on this subject in Jordan, the FHI360 supported civil society in Jordan through its Civil Society Program between 2008 and 2013, with the aim to cultivate a strong and vibrant civil society. Working at both national and local levels, USAID CIS also aimed to strengthen the organizational capacity of civil society organizations (CSOs) and promote cooperation and collaboration efforts between the public sector and civil society in order to address reforms and development challenges.

The USAID Civic Initiatives Support Program (USAID CIS) is a five-year program (2013-18) implemented by FHI 360, a non-profit development organization dedicated to improving lives in lasting ways by advancing integrated, locally driven solutions. The Phenix Center is a non-governmental organization dedicated to independent policy research and measuring public opinions on impactful current and emerging issues in areas of economics, society, and its legislative environment in Jordan. The Center was founded in Amman, Jordan in 2003 under the registration number 142203¹⁹.

Through the course of USAID CIS, an initiative aiming to advocate for a legal environment and promoting a culture which both conforms to and applies international standards for the “freedom of assembly and freedom of association” was funded through two separate grants awarded to the Phenix Center, the first one between July and December 2014 and the second one between December 2015 and March 2018. The two projects were complementary and aimed at fostering workers’ rights and enhancing their right to association through building the capacities of the newly established or independent trade unions in Jordan. This came in response to the weak capacities of independent trade unions and their inability to confront inequalities in labor law and other socio-economic policies. The intervention lies on a theory based on which the rights of workers would be further guaranteed if the role of the newly established trade unions in democratic processes and transition is enhanced, through building their capacities to be efficient, effective, and democratic. In addition, the right to association, pledged by the Government of Jordan, shall be further fulfilled as per the international obligations, if trade unions are enhanced by applying constitutional changes, and revising the law.

Summary of Contribution

The implementation of the **“Enhancing Freedom of Association among Emerging Trade Unions”** project in both phases can be divided into three main action points or pillars as follows:

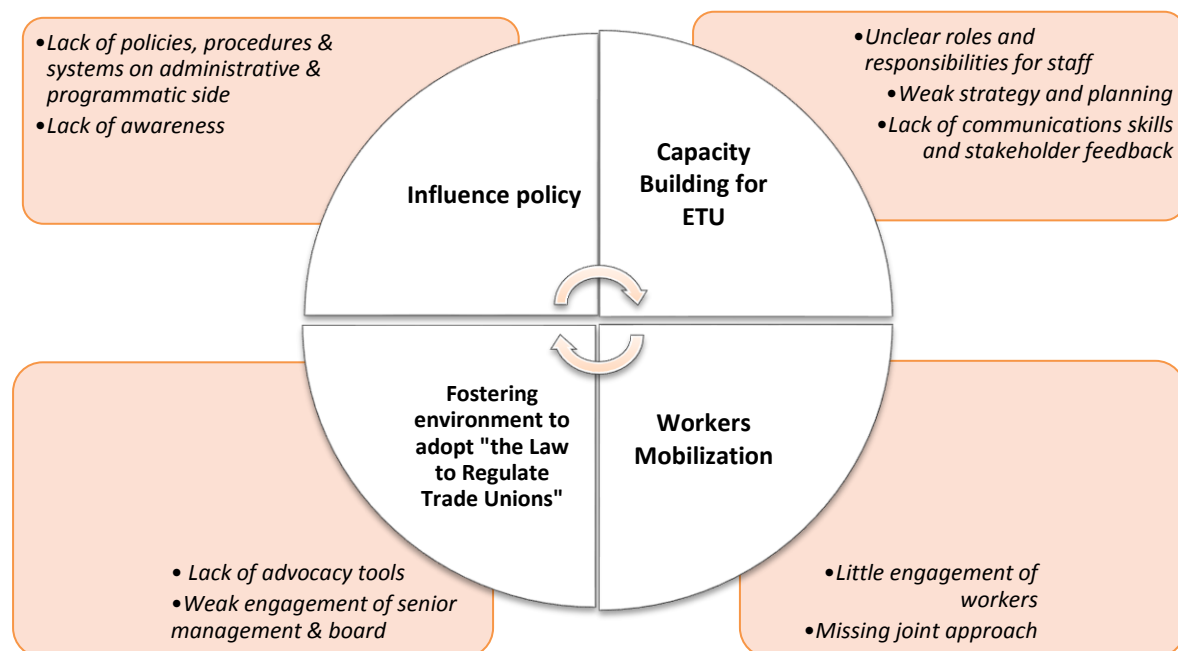
- 1- Research and production of knowledge (phase I and Phase II). Phase I focused on trade unions in Jordan, in terms of the context of their development, membership, economic sectors covered and the challenges they face, as well as trade unions’ stakeholder analysis, analysis of legal framework, identification of best practices in the field of global trade union organizations at the level of legislations and policies, and production of a consensual draft law to regulate trade unions in Jordan in compliance with relevant International Labor Standards. Phase II focused on topical issues in relation to trade unions with the aim to build the knowledge of independent trade unions and help them construct a sophisticated, evidence-based discourse on issues that matter.

¹⁹ The Phenix Center, available <http://www.phenixcenter.net/en/about-center> last accessed on 23 July 2018

- 2- Wide-ranging training, capacity building and direct coaching for trade unions internal management and organizational development (principles of union work, union planning, communication, leadership, collective bargaining and worker mobilization, orientation about international and national practices to establish efficient instruments to advocate for workers' rights based on these practices, planning and communication to ensure unions' ability to implement acquired skills and prevent wrong practices, develop trade union internal policies on gender mainstreaming, communications with media, tax policies, social protection and migrant workers issues; (Phase II)
- 3- Specific efforts deployed to develop new tools and tactics to mobilize workers in various sectors and increase the number of constituents so trade unions grow and acquire increasing weight and influence over labor policies (Phase II)
- 4- Advocacy and lobbying activities, through media shows and materials, debates and direct meetings with policy makers to influence policies in favor of legislations aiming to regulate trade unions in Jordan. (Phase II)

The four-dimension approach to enhancing freedom of association among emerging trade unions can be visualized in the graph below. Beneath each intervention track, the reasons for adopting this specific track are elaborated.

Graph 1: the project synergy



The two project interventions were designed in a complementary manner, as follows:

<u>Phase I Objectives</u>	<u>Phase I Results</u>
Develop an analytical map of the trade unions in terms of membership, economic sectors in which they operate and the challenges they face.	Articulated knowledge about the state of affairs of workers unions in Jordan; their membership base, their geographical coverage; challenges; restrictions they confront and specific union-based format.
Develop an analytical map of stakeholders in charge of legitimizing the freedom to organize for workers	A precise identification of the chain of actors influencing and/or impacting the sphere of works right to organize
Identify the sources of relevant legislative environment for trade union organization in Jordan, through analysis of the relevant legislative framework.	Holistic view of the legal and legislative framework affecting works right to organize
Identify best practices in the field of global trade union organization at the level of legislation and policies.	State of universality practices relevant to workers right to organize assembled to benefit favorable policy development in such arena in Jordan.
Develop a consensual draft law to regulate trade union in Jordan in compliance with relevant International Labor Standards.	Implementation-driven consensus attained with regards to best legal/legislative formula which advances workers right to organize.

While the first phase was mostly research-based, the second phase aimed to build upon the research findings and the intervention was designed in a way to attend to the gaps identified in the first phase. Hence, a comprehensive capacity building program was developed in phase 2, along with the production of specific policy papers aiming to inform independent trade unions and construct their political discourse based on evidence-based data.

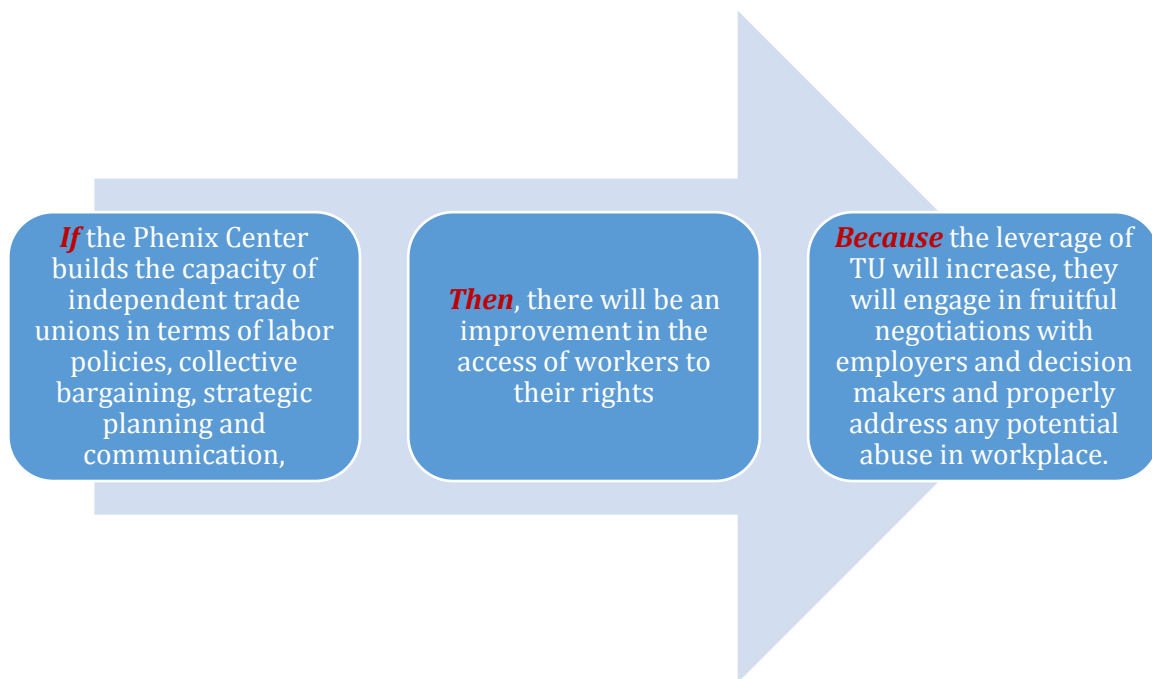
<u>Phase II Objectives</u>	<u>Phase II Results</u>
To strengthen the operational capacity of the newly established unions. This includes democratic elections and management that would guarantee a fair chance for marginalized groups including, but not limited to, women, youth, and persons with disabilities.	The newly established trade unions become aware of the fundamentals of union work, through comprehensive training programs that cover several contents.
To strengthen the ability of the newly established unions to influence public policies regarding the regulation of trade unions in Jordan based on the International Labor Standards (ILS).	The newly established trade unions can identify policy areas that are most relevant to their work and are able to employ existing mechanisms to influence policy that leads to the adoption of the draft law prepared in phase I; "The Law to Regulate Trade Unions in Jordan".

To endow newly established unions with skills, such as planning and communication, to be able to conduct their work.	The newly established unions can properly conduct their job, thanks to the acquired skills in planning action and communicating with all the stakeholders.
To increase the ability of the newly established trade unions to mobilize female and male workers in the sectors they cover through direct engagement.	More male and female workers are mobilized in the newly established unions, which will increase their weight, and subsequently their ability to influence public policies in a manner that leads to enhanced working conditions in Jordan.
To influence the public opinion to respect male and female workers' rights and the existing mechanisms - the right to organize, international conventions, Jordanian constitution and local laws, etc. – to attain these rights.	The public, especially male and female workers, in Jordan are more receptive of the workers' right to organize, which will yield a fostering environment to adopt "the Law to Regulate Trade Unions in Jordan".

The activities implemented in Phase II were the following:

- **Trainings:** conducted a series of trainings for trade unions on: the principles of union work, union planning, communication, leadership, collective bargaining, and worker mobilization. *(Completed)*
- **Workshops:** conducted five workshops, three in Amman, one in the north, and one in the south, with labor activists and stakeholders, to discuss international and national practices to establish efficient instruments to advocate for workers' rights based on these practices. *(Completed)*
- **Coaching:** coaching sessions on planning and communication, as a follow up to the trainings, to ensure the unions' ability to implement these learned skills, and prevent wrong practices. *(Completed)*
- **Policy Development focus-groups:** to develop the trade union's policies on
 - Gender equality. *(Completed)*
 - Communication with media. *(Completed)*
 - Tax policies. *(Completed)*
 - Social protection. *(Completed)*
 - Migrant workers issues. *(Completed)*
- **Mobilization Gatherings:** Unionists were trained on tactics to mobilize female and male workers in their sectors and increase the number of their constituents, which will give them more weight on the ground. *(Completed)*
- **Radio episodes:** -
 - The episodes broadcasted the discussion on labor rights such as the right to organize *(Completed)*,
 - In addition to broadcasting messages on these rights. *(Completed)*

Graph 2: The Reconstructed Theory of Change



In general, the project implementation went smoothly with a high level of ownership amongst independent trade unions, as observed throughout meetings and focus groups conducted by the consultant for the sake of the present evaluation. However, the Phenix Center faced some challenges related to security restrictions imposed on training sessions for independent trade unions, which were supposed to be held in hotels in Amman. The Center showed a high level of responsiveness and quickly came up with alternative plans to ensure the timely implementation of various activities. This will be further developed below.

III. PURPOSE OF THE EVALUATION

In April 2018, USAID CIS commissioned a summative evaluation for the overall contribution of Phenix Center programmatic efforts towards the advancement of the freedom of assembly and freedom of association for trade unions in Jordan. The programmatic efforts of Phenix Center which were considered under this evaluation are:

1. The preparatory phase (July – December 2014) during which preparation activities were undertaken, mainly related to knowledge production and contextual assessment of workers' rights in Jordan (state of affairs of workers' unions, identification and analysis of chain of actors, legal and legislative framework and practices relevant to workers' right to organize.
2. Through a second grant (December 2015 - March 2018), Phenix Center extensively worked on capacity development of trade unions in a variety of fields necessary for strengthening their operational capacity, as well as their ability to influence public policies through wide-ranging trainings on planning, communication and mobilization. In addition, the project included a significant component aiming to influence the public opinion in regards to the respect of workers' rights and existing favorable mechanisms, legislations and governmental commitments.

The purpose of this evaluation is to provide an independent, in-depth assessment of the strategy and impact of the thematic area's related activities, and to provide the Phenix Center's staff and its donor sufficient information about the performance of the program (relevance, effectiveness and sustainability), lessons learned and practical recommendations for follow-up strategies related to civil society strengthening.

Specifically, this final evaluation aims to:

- a. **Determine** project performance in terms of achieving intended targets and results as stated in the project's Results Framework;
- b. **Assess the effectiveness** of the advocacy methodology, advocacy process and advocacy elements (research, capacity building, and dialogue) and the extent to which each of these elements has contributed to the achievement of the advocacy results;
- c. **Assess the extent** to which Phenix has applied Human Rights Based Approach (HRBA) and GEFE principles to grant management and implementation processes;
- d. **Identify** challenges faced by the project teams in achieving the program's objectives;
- e. **Make recommendations** on replicability in terms of achievements, addressing gaps and challenges.

The evaluation process, findings and recommendations is expected to provide essential content for Phenix Center, as well as to capture good practices and, lessons learned to enrich new projects that aim to enhance institutional capacity of Emerging Trade unions within the Civil Society sector of Jordan. It is also aimed to provide an independent, in-depth assessment of the performance (relevance, effectiveness and sustainability) of Phenix Center efforts towards advancing the Law to Regulate Trade Unions in Jordan.

The evaluation aims at particularly looking into:

1- Relevance

Key question: To what extent is the project strategy relevant to the needs identified?

a. To what extent were Phenix's project outcomes, outputs and activities relevant and strategic within the context? To what extent did the grantee adapt to address changes in the context?

- Coherent with international obligations
- Coherent with USAID, USAID/Jordan and CIS's Human Rights and Gender policies and priorities
- Coherent with GoJ national agenda, law, policies, and strategies
- Appropriate socio-cultural sensitivity
- Appropriate assumptions and consideration of major risks, challenges and potential negative consequences

b. To what extent have union members been satisfied with the results of the project?

c. Were there any other factors that should have been taken into account when designing the project?

2- Effectiveness

Key question: To what extent did Phenix Center's strategy achieve planned outcomes and impact? Why and why not? Are there any unintended results of the project?

- a. To what extent did the Phenix Center training activities contribute to the overall strengthening of the Emerging Trade Union Movement?
- b. How did Phenix Center's training structure (training workshops followed by a practical application/coaching for trade unions) enhance learning and advance intended results?
- c. How did Phenix Center's awareness and advocacy strategy provide the intended results?
- d. To what extent was Phenix Center advocacy approach effective in promoting an inclusive approach to enhance women participation in unions?
- e. To what extent were dialogues and workshops between stakeholders (Unionists, Workers, Government and Parliamentarians) successful in advocating for the need to change existing laws in light of the constitutional amendments?

3- Sustainability

Key question: What is the likelihood that the benefits from the program will be maintained for a reasonably long period of time, after the end of the project? Why and why not?

- a. What examples demonstrate sustaining change within Emerging Trade Unions?
- b. What specific skills gained by Unions Leaders are likely to be maintained in the longer term?
- c. Are the newly established union policies inclusive by covering the all aspects of the trade unions and to what extent do they support achieving the trade union's visions?
- d. How did the project outcomes provide solid and rich content (policy and research) to enable and sustain dialogue with the government?

IV. RESEARCH DESIGN AND EVALUATION METHODOLOGY

DATA COLLECTION AND ANALYSIS

The evaluation consultant used a qualitative approach, with significant emphasis on primary qualitative data collection and analysis.

The main source of primary qualitative data was focus group discussions, complemented with a small number of in-depth interviews. Secondary qualitative data was obtained through document review. While no primary quantitative data was collected as part of this evaluation, secondary data was extracted from the document review. This included project statistics, routine monitoring and performance records, and similar documents, as noted below.

Focus group discussions probed knowledge, attitude, and behavioral changes, such as knowledge about labor laws, attitudes towards negotiations and collective bargaining, gender dynamics inside independent trade unions, and behavioral changes in regard to applying these information in practice. “Most significant change” stories and anecdotes also was collected during the discussions. In addition, questions probed opinions about the project’s implementation and how it could be strengthened, such as challenges and opportunities as well as lessons and best practices.

The evaluation consultant conducted all focus groups and in-depth interviews, as per the table below. See Annex II: Interview Protocols and Focus Group Discussion Guide (English).

The focus group analysis was done following a thematic approach, and based on the key evaluation questions.

SOURCES OF DATA

Document Review

Project documentation

- USAID CIS grant document, project description, and modifications (if any)

Project design and M&E documentation

- Results frameworks, including project results framework, M&E grids
- Quarterly, annual, and final reports
- Routine monitoring and performance data

Project statistics

- Evaluation of training workshops
- General project data, such as membership size of independent trade unions

Phenix/project publications

- Policy papers
- Training materials
- Phenix research studies and relevant articles

Secondary documentation

- ILO Jordan country profile, UPR recommendations to Jordan, legal and social frameworks, such as laws, policies, strategies, and standards/norms on related themes produced by the UN, Government of Jordan, and State department, among others
- Research and thematic publications, such as studies, analytic reports, produced by the UN, Government of Jordan, USAID and organizations working on similar issues in Jordan and elsewhere
- Bylaws of independent Trade Unions

In-Depth Interviews

Over the course of the evaluation, the consultant regularly met the Phenix Center director and staff, including contractual trainers and gender consultant, to follow up on particular points or questions, including management and technical consultant, as well as the Parliament official(s) knowledgeable about the policy and trade union context and Phenix intervention.

Focus Group Discussions

- Please refer to table 1 below.

See Annex III: Trip report 1 and 2, Annex IV: Bibliography, Annex V: field notes from focus groups and interviews for additional detail.

SAMPLING

The Phenix Center documentation and USAID CIS SoW were used to stratify focus groups, including TU leaders, new recruits and female members in Irbid, Northern Jordan Valley, and Amman. Data collection also as well CIS and Phenix project staff, and trainers.

In total, 11 focus groups and 10 interviews were conducted with these stakeholders. The organization of the primary data collection is summarized below.

Table 1: Focus groups

Focus Groups	Location
CIS staff Hala Ghosheh, Kinda Jaradat, Lama Sidawi, Diala Alami	Amman
Phenix Staff	Amman
Phenix trainers (3 persons)	Amman
Newly joined unionists (workers in agriculture) males and females	Northern Jordan Valley
General assembly (workers in agriculture) males and females	Northern Jordan Valley
Union leaders (workers in agriculture) males and females	Northern Jordan Valley
Focus group with unions leadership (males) (Taxi drivers and phosphate workers)	Amman
Focus group with female unionists (3 females - workers in health sector)	Amman
New recruits males – trade unions in the North (workers in North municipalities)	Irbid
New female unionists – trade unions in the North (workers in North municipalities)	Irbid

Unions leadership – trade unions in the North (workers in North municipalities)	irbid
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Table 2: In-depth Interviews

Interviews	Location
Mithqal Zinati, head of union (workers in agriculture)	Northern Jordan Valley
Ahmad Awad, Director, Phenix Center	Amman
Samia Kurdi, media producer	Amman
Deputy Khaled Ramadan, rapporteur of Parliament's Labor, Social Development and Population committee	Amman
Rania Sarayra, gender focal point	Amman
Head of Union, Independent Trade Union of Artists	Amman
Head of Union, Independent trade Union of Workers in Tourism Sector	Amman
Imam Mohamad Aburrruman, Spokesperson, The Preparatory Committee of Imams Union	Amman
Head of Union, Independent Trade Union of Workers of the Northern Municipalities	Irbid
Head of Union, Independent Trade Union of Workers in Agriculture (public Sector)	Irbid

LIMITATIONS AND BIASES

As in all researches, including for evaluation purposes, the initial research or evaluation design is hardly fully met. In this case, the segregation in different focus groups between new recruits and union leadership was not always operated, as well as some focus groups that were scheduled were eventually not held due to conflicting times, especially that the evaluation consultant is not based in Amman. Another limitation is related to the fact that not the same people attended all training sessions, hence some of them could not provide feedback for all trainings. In addition, the first phase of data collection was conducted during the holy month of Ramadan, which made the commitment as well as focus of interviewees and focus group participants sometimes compromised. Finally, it is worth noting that during the first phase of the data collection (28 to 31 May), workers went on a full-fledge movement of protest which remained until early days of June, during which the government of Mr. Hani Mulki resigned (4 June 2018)²⁰. Finally, some of the interviews planned with indirect stakeholders such as the Solidarity Center and other institutions working on closely-related issues could not be held, due to conflicting dates and times.

ETHICS

The consultant hereby confirms that the evaluation was conducted with high level of independence of judgment and total impartiality. The findings below correspond to a balanced representation of strengths and weaknesses of the project activities, objectives and results being evaluated.

²⁰ Jane Arraf, Jordan's Prime Minister Resigns Amid Protests Against Austerity", 4 June 2018, National Public Radio, available at <https://www.npr.org/sections/parallels/2018/06/04/616917869/jordanian-prime-minister-resigns-after-large-anti-government-protests> last accessed 29 July 2018.

The consultant also confirms that there is no past experience with the Phenix Center and/or USAID CIS which may have given rise to any potential conflict of interest.

The proceedings for the evaluation explained above are done with **honesty and integrity**, and results are collected and presented to the best of the consultant knowledge and capacity. Throughout the data collection, the consultant showed respect of people's right to provide information in confidence and made sure that participants are aware of the scope and limits of confidentiality, while ensuring that sensitive information cannot be traced to its source. There is no harm directly related to the completion of this evaluation task.

The present report is drafted in the most accurate, complete and reliable possible. Judgments are justified either from reliable secondary data sources or documented primary data collection, as relevant.

Throughout the data collection, the consultant clearly communicated to stakeholders the purpose of the evaluation, the criteria applied and the intended use of findings.

No wrongdoings were found by the consultant during the course of the evaluation.

V. FINDINGS

The findings pertaining to the summative evaluation of the “*Enhancing Freedom of Association among Emerging Trade Unions*” implemented by the Phenix Center for Economic & Informatics Studies are organized in three sections as per the SoW: i) relevance, ii) effectiveness and iii) sustainability. Each evaluation question and sub-question is answered separately, based on direct results collected through focus groups and in-depth interviews. The section on conclusions represents the analytical deductions drawn by the evaluation consultant in response to key questions under each evaluation pillar. Recommendations are provided in the last section, relevant to identified findings and conclusions.

Relevance

a. To what extent were Phenix's project outcomes, outputs and activities relevant and strategic within the context? To what extent did the grantee adapt to address changes in the context?

- Coherent with international obligations
- Coherent with USAID, USAID/Jordan and CIS's Human Rights and Gender policies and priorities
- Coherent with GoJ national agenda, law, policies, and strategies
- Appropriate socio-cultural sensitivity
- Appropriate assumptions and consideration of major risks, challenges and potential negative consequences

The activities, outputs and outcomes of the project implemented by the Phenix Center and funded by USAID/CIS are relevant and strategic within the context of enhancing labor rights and strengthening the capacities of independent trade unions in Jordan.

Focus groups and interviews conducted for the sake of this evaluation showed that there is an immense need to support independent trade unions and build their capacities to increase their leverage and improve their positioning for defending the rights of workers, across fields.

Throughout the project implementation, Phenix showed a high level of responsiveness in adapting to challenges they were facing, such as being forbidden from organizing training events for independent trade unions in hotels and public spaces. In response to this, Phenix decided to use funds from the 10% institutional capacity building component to create an internal meeting room (as reported by CIS staff) and the project did not suffer from delays in implementation.

The project is also in line with the Jordanian Government international obligations in terms of freedom of association. As mentioned in the introduction, Jordan is a signatory state of a number of international human rights conventions and is regularly subjected to the Universal Periodic Review (UPR) of the United Nations Council of Human Rights, whereby a series of recommendations are released for the Government to follow for a greater adherence to human rights principles and public liberties. Although the Government of Jordan seemingly deploys efforts to follow these

recommendations as reported by various UPR reports, a lot remains to be done, especially in the field of freedom of assembly and association²¹ as follows:

118.69. Ensure that the legislation and the State respect articles 19 and 21 of International Covenant on Civil and Political Rights, which guarantee freedom of expression and freedom of association and assembly (Spain); p.13

118.81. Take measures to allow peaceful public meetings to be held freely and avoid using politicized charges and vague terminology which prevent citizens from exercising their freedom of assembly and association (Mexico); p.13

119.12. Take measures to foster an enabling environment for civil society, including by amending the Societies Act to remove the restrictions on the establishment of civil society organizations, eliminate the role of government in civil society organizations, including in appointing State employees to newly established civil society organizations, remove the requirement for Cabinet approval of foreign funding for civil society organizations as well as any other undue restrictions and controls by the Government on them (Canada); p.14

More specifically, the Jordan Country Report on Human Rights Practices for 2017 issued by the United States Department of State, Bureau of Democracy, Human Rights and Labor, reports restrictions on the establishment of new trade unions unless approved by the Ministry of Labor and required by at least 50 founding members. The report also highlights the absence of the right to collective bargaining although the labor code provides for collective agreements²². In that sense, the Phenix project comes as a very relevant response to the shortcomings identified in these reports.

In relation to USAID and CIS Human Rights and Gender policies and priorities, the Phenix project is compliant with these policies as it tackles an important aspect of civil and political liberties as stipulated in the International Covenant for Civil and Political Rights. As reported by CIS staff, the project also adopted a remarkable gender mainstreaming policy, whereby their efforts in that sense were very much appreciated by CIS gender expert, because they showed great interest, eagerness to learn and responsiveness to gender mainstreaming: “Phenix were trained and their staff participated in the community of practice sessions which included in-depth discussions about gender issues. Phenix wanted to do create a gender unit, they wanted to do a gender policy, and this shows a great commitment to gender equality”, she says.

Finally, it was reported by Phenix staff that the internal security forces tried to intimidate the center by banning their training events from hotels, “because the government was trying to hamper the emergence of an independent trade union movement”. In that sense, the project implemented by Phenix is not necessarily coherent with GoJ national agenda, law, policies, and strategies per se, but it does relate to the Jordanian constitution provisions supporting freedom of association and the formation of trade unions (ref. introduction). Throughout interviews, the project was seen particularly beneficial because it tackles an important sector that has been historically under-represented, i.e. the workers’ sector, which encompasses a large segment of the Jordanian society. Heads of unions, whether in focus groups or interviews said “the government has always dealt with trade unions as a security issue because trade unions aim to organize workers, which the government fears, hence always tries to keep this sector under their direct control”.

²¹ UPR of Jordan, Second Cycle, 17th session, 2013, available at <https://www.ohchr.org/EN/HRBodies/UPR/Pages/JOindex.aspx> last accessed 29 July 2018

²² Country Reports on Human Rights Practices for 2017 United States Department of State, Bureau of Democracy, Human Rights and Labor, Jordan, available at <https://www.state.gov/documents/organization/277493.pdf> last accessed 27 July 2018.

The evaluation also showed that the project had an appropriate socio-cultural sensitivity in the sense that no wrongdoings were reported in this regards by any of the stakeholders interviewed. Appropriate assumptions and consideration of major risks, challenges and potential negative consequences were also visible, especially as the Phenix leadership has already engaged in similar endeavours prior to implementing this particular project.

b. To what extent have union members been satisfied with the results of the project?

Across focus groups and interviews, union members expressed high level of satisfaction in relation to the project implementation and results. They expressed admiration and gratitude towards the Phenix Center for the unconditional and ongoing support, and considered that the project has significantly improved their positioning as independent trade unions. Consistently across the groups and interviews, many union leaders and members would say “we now know what unions’ work is really about, which is something we never knew about before”.

The series of trainings conducted under this project were extremely relevant to the needs of independent trade unions as many of them repetitively celebrated the importance of the input received through the project. As put by a member of the trade union of workers in agriculture in the Jordan Valley “the trainings were very useful and the overall approach to learning was very beneficial, especially as there were differences in the level of education of the audience, but the Phenix Center successfully adapted to this”. (Trade union of workers in Agriculture, Northern Jordan Valley, 29 May 2018)

Trainers were also very positive about the direct value of the project on trade union members; the most important thing they reported is related to the realization union members have made that “their work was linked to international law. The project succeeded in establishing a conviction amongst trade unionists, which is that their demands were included in the international law, which increased their resolution to claim their rights because of the government’s negligence towards them” (trainers, Amman, 28 May 2018).

Having said that, some union members said that unions have not yet accomplished any tangible achievement. This was particularly the case for the new recruits in the trade union for workers in agriculture in the Northern Jordan Valley. When asked what they would expect from the trade unions, many said they wanted direct benefits, such as micro-credits, or a small livestock so they can be independent. Others said the trade union did not succeed in getting health coverage for workers. Most of those who spoke in these terms were women who seemed not very well informed of what a trade union actually is. Other women in the trade union for workers in Northern municipalities also seemed reluctant because the trade union is not legalized. Further details about women involvement in independent trade unions and the gender aspect of trade union activism will be further elaborated in a specific section on gender, under the effectiveness section below.

c. Were there any other factors that should have been taken into account when designing the project?

Although the project was very well designed as reported by various stakeholders interviewed, it would have better had the project taken into account the internal governance issues of independent trade unions, including the general federation for independent trade unions, and involved trainings about conflict resolution and mediation skills.

The evaluation showed that there were some problems inside the general federation of independent trade unions, mainly related to leadership and representation. In brief, the presidency of Suleiman Jumaani is officially challenged by the trade union of workers in agriculture in the Northern Jordan Valley, while the head of the trade union of Artists expressed strong resentment about Jumaani leadership, and internal decision making channels and mechanisms within the federation. The reasons for this dissent has not been further explored by the consultant as the evaluation did not aim to tackle this particular aspect of the independent trade unions' work, but it is nevertheless important to ensure that these established structures are strong, resilient and able to manage internal conflicts, as this is part of the sustainability plan, which in turn preserves the achievements accomplished through the project. In addition, it is worth mentioning that the Phenix Center leadership significantly contributes to keeping the dialogue between various parties inside the federation, but this is rather in an informal way, in Mr. Ahmad Awad's personal capacity as a figure himself in the trade union movement.

Effectiveness

- a. To what extent did the Phenix Center training activities contribute to the overall strengthening of the Emerging Trade Union Movement?
- b. How did Phenix Center's training structure (training workshops followed by a practical application/coaching for trade unions) enhance learning and advance intended results?

Across focus groups and interviews, it was shown that the project significantly contributed to the overall strengthening of the Emerging Trade Union Movement. This was particularly the case in the understanding of international standards and commitments and Jordanian legislations favorable to the freedom of association, leadership, and collective bargaining. These trainings were designed based on the findings of the first phase of the project, whereby a mapping exercise was undertaken as well as thorough research efforts that eventually resulted in 5 research papers. These research papers were the following:

- 1- Draft law for the organization of labor unions
- 2- The legislative framework for the right to organize workers' union
In the light of international law
- 3- Map of trade unions in Jordan in 2014
- 4- Map of social partners in promoting freedom of association – the case of Jordan
- 5- Best practices for the field of trade unions organizations and freedom of association

All these research pieces served to design the training materials, and hence specifically address the knowledge gap of independent trade unions. In that sense, and despite a year-gap between the project first and second phase, which is due to time issues on behalf of the Phenix Center, as reported by CIS staff (Amman, 28 May 2018), the design of the two projects is very much synchronized and very well coordinated.

Across focus groups and interviews, stakeholders considered that the training activities, which were the major component of the project, were extremely beneficial for the independent trade unions leaders and members. Behavioral modifications were noticeable in meetings held with heads of trade unions as well as other board members as they themselves admitted that they were “unorganized, ignored basic principles of trade unions activities, and knew nothing about collective bargaining and negotiations”. (Trade union of workers in Northern municipalities, Irbid, 3 July 2018) Interviewees also talked about behavioral changes they adopted as a result of the program, especially in approaching issues related to workers' rights. In addition, the project resulted in the improvement of skills related to communication, collective bargaining, negotiations, mobilization and ability to build strong arguments. Across interviews, it was reported that the project contributed to eliciting individual success stories, mainly union leaders including some women, who stated that they were very proud of their advancement in self-confidence, leadership and representation. Unionists showed a lot of enthusiasm when talking about the project and the behavioral change was obvious to trainers and project stakeholders.

The head of the Phenix center said the independent trade unions were very present in the May strikes, and had actively participated, along with their membership, in the demonstrations. This is a sign that the project has contributed to the strengthening of the independent trade unions and furthered their presence as active advocates of workers' rights.

The head of the trade union for taxi drivers said “our argument became stronger as we acquired the knowledge about principles related to freedom of association and the commitments of Jordan in this regard”. (Focus group with three heads of unions, Amman, 30 May 2018) The head of the trade union of workers in the electricity said “the trainings were extremely useful because we learnt the principles of collective bargaining and technics of negotiation”. (Focus group with three heads of unions, Amman, 30 May 2018) The head of the Independent Federation, who is also the head of the trade union for phosphate workers explained that there were negotiations principles which he learnt in the trainings he did not know before, such as when to call for strikes, how to use the strikes for getting to the negotiation point, how to protect strikers, and the importance of keeping the negotiations going after the strikes stop, through the formation of follow-up committees made up of workers and employers. (Focus group with three heads of unions, Amman, 30 May 2018)

It is worth noting that one of the trade union leaders interviewed (trade union for taxi drivers) said he did acquire negotiation skills, and how “to become diplomatic” but very consciously decided not to use these technics because he is a “radical trade unionist” and does not want to change. The interview was taking place in Amman before and after the May strikes for the income tax²³.

In regards to the training model, whereby a training session would be delivered to each trade union independently, followed by coaching sessions, interviewed stakeholders voiced positive feedback about this model whereby each union had the possibility to work on their own strategies within the training sessions. While the social media and communication training was not considered as a success by the trainer who delivered it due to the difficulty to deal with different levels of education and media awareness within the training, it was perceived by participating trade union members as a major acquisition, as many of them said it was extremely beneficial. The post-training coaching sessions which trade unions have received were also praised as a method for reasserting the acquisitions. The training structure was considered as extremely beneficial to induce positive changes.

Only one of the interviewed stakeholders, MP Khaled Ramadan, who is the rapporteur of the Parliament's Labor, Social Development and Population committee, said the independent trade unions still lack the knowledge required to play a more significant role in collective bargaining and lobbying inside decision making circles. He related his own experience with a committee of the independent trade unions while discussing the labor law, whereby “independent trade unions were not professional in managing the conflict, and showed limited experience in lobbying and policy influencing”. He added, “nothing can be achieved without a little pragmatism, and independent trade unions are often not pragmatic, mainly because they have been barely active in political parties and significantly lack experience in collective work”. (MP Khaled Ramadan, Amman, 2 July 2018) Having said that, MP Ramadan acknowledged the importance of independent trade unions, as a better representative of workers' rights than official trade unions that are completely coopted by the government, and often do not fairly represent workers' issues and interests.

Finally, the project induced awareness among unionists and indirectly encouraged a large movement of mobilization. Although this was a main objective of the project, the Phenix center team said this component was rather limited, and there wasn't a specific training on mobilization which was indirectly provided throughout other trainings. However, the visible devotion of workers to their unions and their understanding of unions' principles and commitment to workers' rights resulted in a wave of new recruits who joined the trade unions. Many members across the groups said they spontaneously spoke out to their colleagues and invited them to join the union. Once they became 'believers' themselves, it was a natural reaction for them to 'preach' to their fellows about the

²³ “Thousands strike, rally against income tax draft law”, Raed Omari, Jordan Times, available at <http://www.jordantimes.com/news/local/thousands-strike-rally-against-income-tax-draft-law>, last accessed 13 August 2018

importance of joining trade unions and advocating for their rights, as part of a large independent unionist movement. This specific finding is significant for two main reasons: i) there is a direct result which can be attributed to the Phenix project, in relation to the mobilization of new recruits among independent trade unions. This is obviously important for strengthening these unions and enlarging their membership so they become stronger, with increased presence, and hence improved credentials to negotiate, be heard and eventually deliver; ii) more importantly, the mobilization did not come as a result of a direct activity in this regard, but rather as an indirect result of another activity. This can be considered as an undeniable corroboration of the relevance and effectiveness of the project overall, and of the trainings delivered, more specifically.

Having said that, the channels of communication across unions are weak, and little is known about achievements in various unions, which makes some members, especially new recruits, less enthusiastic, and sometimes very skeptical about the importance and potential impact of unions.

Across the focus groups with union members, comments such as “nothing has been achieved since we joined”, or “we haven’t seen any direct benefit so far” were recurrent. This was more the case for new recruits, especially women, who had also expressed fear of being part of ‘illegal’ groups, in reference to the non-legalized status of the independent trade unions. This came up mainly in the focus group held with females from the trade union of workers in Northern municipalities in Irbid (3 July 2018). This also came up in the focus group held with members (males and females) of the trade union of workers in the agriculture sector in Northern Jordan Valley (29 May 2018). In both groups, these comments were made mostly by union members who have not attended the trainings. While this actually shows that the trainings provided by the Phenix Center contributed to forming ‘believers’ in the cause of trade unions, it also shows that limited effort was put by union leaders to convert their membership into strong believers on the one hand, and on the other hand, the success stories of independent trade unions and what they could actually do has not been widely shared or used as examples that illustrate the importance of trade unions and the impact they could have on workers’ rights.

c. How did Phenix Center's awareness and advocacy strategy provide the intended results?

The Phenix Center's strategy for awareness and advocacy mainly focused on media. As a result, the project activities included the production of a radio program of 30 episodes, over the course of two years. Episodes were not broadcasted on a regular basis. The objectives of this radio program, as explained by its main host journalist Samia Kurdieh, was to raise the awareness of the public in regards to human rights in general the rights of workers in particular. The program was a talk show, a 50-minute broadcast aired on Tuesdays. It was designed in a way to mix between various styles, including a main studio guest, a field report and an opinion poll.

The studio guest was chosen from among a pool of experts specializing in a topic that is put up with fetching data and statistics for the subject.

The field reports were formatted as vox pops whereby random people would be asked about their opinions on certain matters, often on the streets, and their responses are broadcasted on the radio so listeners would know, very roughly, the most common public opinion about the topic of the episode. At the beginning of each episode, the program would showcase a summary of the workers' news, in which all the labor activities that took place in the week were monitored, including business sector news, strikes, government decisions, etc. about the labor sector.

The topics chosen were based on the project's objectives, in addition to topical issues that would be on the public agenda while producing the various episodes.

According to various stakeholders, the radio program produced by the Phenix Center is one of its kind, because it is the only program that addressed the issue of workers' rights in the Kingdom, as reported by journalist Samia Kurdieh. (interview, Amman, 31 May 2018)

Having said that, it is impossible to estimate the outreach of the program, because this is not monitored by the radio itself. It is nevertheless worth noting that this program was aired on one of the first community radio station in Jordan, which "has a direct effect on society by engaging citizens of Amman as civic actors and promoting new ways of thinking analytically and strategically"²⁴. In 2005, the radio had an outreach of over two million listeners²⁵.

The social media interaction with the episodes was rather limited, with an average of 16.2 likes on each of the first 5 episodes.²⁶ The data for the rest of the episodes were not available. It is also to be noted that a very limited number of independent trade unions members were aware of these radio episodes.

Most significant success stories reported by the Phenix Center include positive interaction from listeners, especially women victims of abuses in the workplace. The group was connected to the center's team, which in turn initiated mediation between them and the employer to claim their rights. The clashes resulted in women gaining their rights and improving their working environment. In episode 22, which spoke about the forms of economic violence against women in the workplace, and hosted journalist Rania Al-Sarayra, a female employee immediately contacted the program producer after the episode. She spoke about her exposure to some form of economic violence as she does not receive equal pay as her male colleague, despite the equal experience and qualifications. This woman said she did not know before hearing the episode that it was a form of violence. The information was

²⁴ Community radio as civic media: the case of radio al-Balad 92.4fm in Amman, Jordan", Gretchen King, McGill University, 2016, available at <https://medium.com/civic-media-project/community-radio-as-civic-media-the-case-of-radio-al-balad-92-4fm-in-amman-jordan-bee11682f07f>, last accessed 14 August 2018

²⁵ Ibid.

²⁶ Annex 8, media coverage of episodes 1 to 5.

delivered to Dr. Iman al-Akor, head of the economic empowerment department in the Directorate of Women's Work at the Ministry of Labor.

The producer reported having faced challenges with finding adequate guests, while some guests refuse to appear on the program. In addition, there is a limited number of official stakeholders in charge of labor issues, namely the Ministry of Labor, which is the only one holding the reins of the entire labor sector in Jordan.

Finally, it is worth noting that the number of male guests was overwhelming compared to women guests, which was justified by the program producer by the scarcity of women active in labor issues in Jordan. Kurdieh also reported having faced challenges in relation to the lack of active civil society organizations in this field.

d. To what extent was Phenix Center advocacy approach effective in promoting an inclusive approach to enhance women participation in unions?

In terms of gender, the Phenix center undeniably did efforts to mainstream gender in their overall programming, as well as for this project in particular, where a gender focal point was appointed. The CIS staff, especially the gender specialist, seemed to be very pleased about the “Phenix’s approach to gender integration, whereby the Center’s team were very eager to learn and showed high level of responsiveness in this regard. They were trained and eventually participated in a community of practice on gender issues. Phenix wanted to do create a gender unit, and apply a gender policy, which shows high commitment to gender equality overall, not only for the sake of this project”. (Focus group with CIS staff, Amman, 28 May 2018) According to CIS gender focal point, “Mr. Awad had always tried to ensure that both genders as well as people of different age groups were present in different meetings”.

Having said that, a number of the trade unions targeted by the project did not have any female membership, mainly due to the nature of their activity, such as workers in the tourism sector (as drivers and accompanists for tourists), taxi drivers, imams, workers in the electricity, etc.

As shown in the table below, 3 out of 8 trade unions have less than 1% of female members (including two that have zero female members), 3 that have 30% or less female members, while only one has 65% women members, including at the leadership level (6 out of 11 board members are women, while the head of the union is a male, Mithqal Zinati). Only one out of 8 trade unions is headed by a woman. Another woman also chairs the trade union for workers in the agriculture public sector in Irbid, not accounted for in the table below.

Table 3: overview of trade unions gender participation

Name of TU	Year of Establishment	Last elections held	Number of board members, including women	%	Membership, including women	%
Independent trade union of Workers in Tourism transportation	Dec 2016	-	11 all males	0%	470, all males Male-dominated sector	0%
Independent trade union for Artists	Dec 2013	June 2017	11, 3 females	27.3%	340, 80 females	23.5%
The Preparatory Committee of Imams Union	Nov 2011	May 2017	9, all males	0%	105, all males ²⁷	0%

²⁷ The preparatory committee was advised to include the female preachers in their unions, but this faced strong opposition from the membership under the pretext that they should not be included and that their interests can be represented by men inside the TU. Efforts were made by Phenix in this regard, to no avail, despite the fact that the spokesperson of the committee expressed his full support to this, yet could not lobby for it due to strong opposition voices.

Trade Union of Workers in Agriculture	March 2014	July 2017	11, 6 females	54.5%	1260, 819 females	65%
Independent Trade Union of Workers in Health Services	May 2016	-	7, 3 females, including the head of union	43%	153, 46 females	30%
Independent Trade Union of Taxi Drivers	July 2012	Nov 2016	21, all males	0%	7800, all males Male dominated sector	0%
Independent Trade Union of Workers of the Northern Municipalities	April 2014	April 2016	15, 4 females	26.7%	6280, 1256 females	20%
Independent Trade Union of Workers in Railway	2011	2016	9, all males	0%	750, 5 females	0.67%
Independent Trade Union of Workers in the agriculture sector (public – North)	NA	2017	9, 4 females	44.5%	1260, unidentified number of women	NA

Source: The Phenix Center and direct information collected from interviews

The advocacy approach of the project was relatively effective in enhancing women participation in unions. However, fear remains more pronounced in women circles rather than in men ones, especially in relation to the “illegal” status of the unions. In addition, patriarchal practices persist inside trade unions, with a limited number of women union leaders, and societal norms acting as impeding elements for women participation, despite commitments to gender quota and gender equality.

For example, female members of the independent trade union for workers in northern municipalities said they initially joined the trade union because they wanted to advocate for their rights. However, unlike their male fellows, women in this trade union were very conscious about the non-legalized status of their union, hence expressed some hesitation to further pursue their activism due to fear from the government and municipalities pressure, as well as because they felt this was not leading anywhere: “I initially joined, recruited by (the head of the union), but then I withdrew and stopped being active in the activities, although I am still a member. I was afraid from the pressure which was exerted on us, and I also felt this is useless” (focus group with female unionists, Irbid, 3 July 2018)

This was also the case of some female unionists in the Northern Jordan valley. Women were the ones who considered that trade unions should be in charge of providing micro-grants for workers to establish their own businesses, and deplored the dereliction of their trade union in this regard. In Amman, the independent trade union for workers in the health sector, which mainly features women (Rf. Table 3) female unionists were more enthusiastic about the trade union than their fellow unionists in other unions. As put by one of the members, “girls are now bolder than men. Men have great apprehension of joining. Girls participate more because girls are more abused in the labor market (long working hours, very little pay, very poor working environment)”. (focus group with

female unionists, workers in the health sector, Amman, 30 May 2018) Another member from the same group considered that the reason for the apprehension shown by workers to join labor unions is the fear from being associated in any kind of political activism; she adds “unions are not political”. This led the head of the union to intervene to explain that the workers’ rights are at the heart of political activism, and one should never fear this kind of politics, because it contributes to the advancement of societies”. (exchange from the focus group with female unionists, workers in the health sector, Amman, 30 May 2018) These exchanges from various groups held with women unionists shows that the nature of the trade union activities seems to still be somehow misunderstood, especially by women. This could be attributed to the fact that women are generally less politically active than men, not because of any personal traits, but rather as a reflection of traditional gender roles and societal expectations of women’s functions and responsibilities. This actually resonates with general comments collected in focus groups held with male unionists, including from the unions’ leadership, when gender issues and women participation were broached during focus groups held in the course of this evaluation. When asked about women participation in the trade union activities, these male members were very proud to explain their commitment to the gender quota in the TU board. When asked about the reason why women on the board do not have any specific position, men said “the conditions of women are more difficult because they have societal limitations, and family responsibilities, and whenever they try to break these restrictions, they collide with the reality around them”. (focus group with male unionists, workers in Northern municipalities, Irbid, 3 July 2018) One of the female board member explained that when they were distributing the various positions inside the board, she wanted to run for the secretary position, but she felt that she was not welcome: “men started telling me how can you do that, you will be asked to go to Amman and spend days there, you won’t be able to do that because you are a woman, so I withdrew. Men took all the positions, until they wanted to nominate someone for the women committee, I told them how come all positions are occupied by people from Irbid, how about Ramtha (the municipality where I work), and this is how I eventually got this position”. (Focus group with female unionists, workers in Northern municipalities, Irbid, 3 July 2018) This actually shows that women participation has not yet been completely integrated in practices and customs, and the family obligations, often laid upon the shoulders of women, are consistently and systematically used against them, and to obstruct their access to any leadership position, especially in the public sphere. The head of the independent trade union for workers in the health sector said she faces some discrimination within the union, often from fellow females, such as unnecessary challenging attitudes, but this union is generally women-friendly and no major issues are to be reported. She also talked about gender-based violence, namely sexual harassment in the workplace. She said “women do not like to talk about these issues, but we are trying to tackle this problem as much as we can, and whenever such cases are reported to the union, I take it to the end. There was a case we dealt with, which eventually resulted in the firing of perpetrators”. (Focus group with female unionists, workers in Northern municipalities, Irbid, 3 July 2018)

On the sexual harassment issue, the consultant asked female workers in the agriculture sector in Jordan Northern Valley whether this was tackled as part of the training or strategic planning of the trade union, but female unionists said this was never tackled, although cases of sexual harassment in this field are very common.

Rania Sarayra, the gender focal point appointed by the Phenix center to follow-up on this project from a gender perspective, said efforts towards gender mainstreaming were done across all training, whereby she personally reviewed and adapted the materials. Although a gender quota was introduced in a large number of independent trade unions, she considered that the number of active unionists remains limited, and that “women do not feel self-confident as they do not believe in their leadership ability”. She also said that women are usually afraid of engaging in political activities, as they often fear reprisals, whether in the public or the private levels, and would rather keep a low

profile when it comes to rights-based movements. (Interview, Amman, 2 July 2018) Although this might sound as blaming women, it is important to note that a number of women interviewed throughout the evaluation seemed to have adhered to this discourse as a de-facto situation, where women are primarily care-givers and anything else comes after, or doesn't come at all, without necessarily noticing that the environment is not women-friendly in general, and that no specific provisions were ever made at the societal level to encourage a greater engagement of women in the workplace or in any sort of political or social activity. Justifications for the low number of women leaders in unions were recurrent across the groups and interviews in terms like "women do not have time", "women cannot take on this kind of responsibilities", and "women cannot bear any kind of reprisals". In many cases, women were not considered strong enough to confront employers or authorities and some women unionists themselves said they would prefer to be represented by men.

The spokesperson of the preparatory committee of Imams Union Mohammed Rasul Abul Rumman said he made efforts to include female preachers in the union, but this was vehemently opposed by other members in the union, and eventually did not take place.

Finally, on the radio episodes, Samia Kurdieh said she tried to mainstream gender in all the episodes, except for some cases where the sector itself did not include any women, such as taxi drivers, workers in tourism and imams. 5 to 6 episodes were designed around women specifically, such as their contribution to the agricultural and educational sectors, the status of women in the labor code, the economic participation of women, and the international day for women. The evaluations cope did not include the analysis of messaging around women inside the episodes.

- e. To what extent were dialogues and workshops between stakeholders (Unionists, Workers, Government and Parliamentarians) successful in advocating for the need to change existing laws in light of the constitutional amendments?

The project could not focus on organizing dialogues and workshops between stakeholders, namely between unionists and workers on one side, and the government / parliament on the other side, as it was initially planned, because the government and officials were not responsive in this regard, as reported by the head of the Phenix Center. This can also be linked to the restrictive measures which the government and intelligence services were imposing on the activities undertaken by the center, including trainings, whereby the Phenix center was prevented from holding these training sessions in public spaces. As a result, the Phenix center decided, for the sake of the project, to reconsider some of the activities so the trainings and capacity building of independent trade unions can still be delivered. However, some talks were initiated between independent trade unions and their employers: for example the independent trade union for workers in chemical industries, the independent trade union for workers in Northern municipalities, as well as the independent trade union for workers in the phosphate company went on a strike and eventually succeeded in engaging in negotiations with the company and line ministries. Although the employers and the government did not officially recognize that their main interlocutors in these cases were independent trade unions, the negotiations did take place and resulted in the granting of some rights and claims, but this was done under the label of a “group of representatives of workers”. The taxi drivers also went on a strike, and eventually engaged in negotiations with the ministry of transportation for the issuing of taxi license plates. While the Phenix center does not claim these breakthroughs of independent trade unions’ cases of collective bargaining, independent trade unions do acknowledge the importance of the Phenix center contribution in this, which is to be directly attributed to the trainings, knowledge resources (through policy papers) as well as coaching and direct follow-up provided by the Phenix center, mainly in the person of its director, Mr. Ahmad Awad.

Furthermore, the independent trade unions were active interlocutors, although unrecognized as such, for the Parliament committee on labor and social development in the ongoing discussions about the amendment of 39 articles in the labor law, mainly in relation to the freedom of association. This dialogue was informally initiated by the Phenix Center, whose director advised to the committee rapporteur to invite independent trade unions and listen to them. Although the present project did not directly aim to engage independent trade unions in this particular discussion, it is obvious that the empowerment of independent trade unions, undertaken under this project, enabled them to actively engage in official talks on topics that matter. However, as mentioned above, the rapporteur of the parliamentary committee, MP Khaled Ramadan expressed some sort of resentment about the way independent trade unions led these discussions, as “they showed inflexibility, and did not want to make any compromises”. According to him, this shows “lack of maturity and limited understanding of the reality of things in Jordan politics”.

When the tax law was drafted, the government did not engage in any discussions with stakeholders and interest groups, including independent trade unions; however, the Phenix center advised that independent trade unions visit the International Monetary Fund and expose their concerns, based on the policy paper that had been previously developed on this topic. Again, this cannot be considered as a direct activity of the present project, but it definitely shows the awareness, scope and outreach of independent trade unions, which were further enhanced through the CIS project contribution.

In addition, it is undeniable that the project contributed to breaking the barrier of fear amongst trade unions and significantly added to the public debate on related legislations, especially through the policy papers that the Phenix Center has developed, through the course of the project. The policy papers also bridged the knowledge gap which existed before this project was implemented,

especially in terms of international labor standards, civil and political rights, essentially the freedom of association and the right of workers to organize in unions. These policy papers were the following:

- 1- Social protection
- 2- Tax policy
- 3- Migrant workers
- 4- Gender
- 5- Communication

Having said that, the focus groups and interviews conducted with various stakeholders showed that the independent trade unions have limited information about the policy papers and said they were not part of this specific component. When asked about this, Mr. Awad from the Phenix center explained that the development of the policy papers was done towards the end of the project lifetime, hence independent trade unions did not yet have access to them at the time where the data collection was conducted. However, he assured that the independent trade unions were consulted during the development of the policy papers through key informant interviews and consultative focus group discussions that were conducted by the research consultants. While this has not been confirmed in the course of this evaluation, it is to be noted though that many of the independent trade unions expressed some sort of understanding of labor rights' issues, which indicates a certain level of involvement, even if quite informal, in the knowledge production process. Many of them also said they have significantly benefited from the project at the knowledge level, whether through the trainings or informal talks with the Phenix center, which made them more capable in engaging in constructive and well informed discussions about the issues that matter to them. Although no law changes have been made, the debate is still ongoing, and the Phenix center is an important resource in this regard, through the policy papers and research briefs that were published under this project. Through this project and other contributions to the topic, the Phenix Center succeeded in positioning itself as reference in relation to the rights of workers and labor issues and enjoys a good deal of connections with decision makers, which contributes to the sustainability of the project after CIS withdraws.

Sustainability

a. What examples demonstrate sustaining change within Emerging Trade Unions?

The project implemented by the Phenix center contributed to significantly building the capacities of independent trade unions to better undertake efforts for the improvement of workers' situation and fulfilment of their rights. As mentioned under the effectiveness section, a number of independent trade unions engaged in fruitful negotiations with employers as well as with government, as an indirect result of the trainings they received, where they became more confident about their role and their entitlements, as per the Jordanian constitution and international standards and obligations.

Across the focus groups and interviews, leaders and members of independent trade unions were obviously self-assured and well poised in terms of what their role is, and very confidently spoke of the legitimacy of their actions. Although the project did not have baseline information, unionists spontaneously spoke of the knowledge gap they had as well as about their doubts and lack of experience, which the project very rightfully addressed.

b. What specific skills gained by Unions Leaders are likely to be maintained in the longer term?

The knowledge acquired in the field of workers' rights, labor issues, and international standards as well as the Jordanian regulations and obligations is very likely to be maintained beyond the project lifetime. Principles of collective bargaining, including the timing and instrumentalization of escalating actions, seem to be extremely fixated and consolidated within unions' leadership. It is to be noted as well that the constant support from Phenix leadership contributed to building a complex set of skills for trade unions, enabling them to play a leading role in the trade union movement. As put by the head of the independent trade union for artists, "the Phenix project created strong union leaders", which is a visible impact that will last beyond this project and will constitute a major shift in how trade unions will operate in Jordan in the future. (Interview, Amman, 4 July 2018)

In addition, the impactful presence of independent trade unions within the various sectors will probably encourage other workers to join, as well as other sectors to organize within unions.

In terms of gender, the introduction of the women quota in independent trade unions is an important measure to commit to, promote and sustain gender equality values. The fact that a number of trade unions is headed by women can be counted as a change that can be sustainable if further encouraged, for reconsidering gender roles and gender stereotypes.

c. Are the newly established union policies inclusive by covering all aspects of the trade unions and to what extent do they support achieving the trade union's visions?

The project undeniably operated a breakthrough in the way independent trade unions approach the issue of workers' rights and union work. The project empowered independent trade unions to establish internal regulations and bylaws. So far, these bylaws proved to be democratic to a large extent, resulting in change of leadership in a number of trade unions over time. (Rf. Table 3) However, some problems are emerging in relation to the leadership of the Federation of Independent Unions, and this can be risky factors in the future, which could hinder the cohesion and solidarity within independent trade unions. Main problems are related to disputes over leadership, often for "personal

reasons and lack of maturity”, as reported by the rapporteur of the Parliament’s Labor, Social Development and Population committee (interview, Amman, 2 July 2018).

However, the communication plans of independent trade unions need further improvement, especially in terms of outreach to both the members and the wider public. This came as a direct feedback from the trainer who delivered the communication training, as well as from some trade unions leaders who said a longer and more focused training would be useful to refine their communication styles, diversify their tools, strengthen their messaging and widen their outreach. It is to be noted though that Rania Sarayra who served as a gender focal point for this project, happened to be a journalist herself, and she considered that the way trade unions deal with media has significantly changed as a result of this project, and more specifically the training on communication which they received.

In terms of gender, it is undeniable that the project has contributed to breaking barriers whereby a number of women were able to reach leadership positions, and probably paving the way for other women to join and engage in unions. While little can be said about what specific messages were broadcasted in these episodes as this was not part of the evaluation scope, it is important to mention that the programme host said she struggled to ensure

d. How did the project outcomes provide solid and rich content (policy and research) to enable and sustain dialogue with the government?

The project resulted in the development and production of quality knowledge in the field of trade unions and labor issues that serve as a reliable resource for any future research on this to the policy papers per se took time to develop, it is undeniable that the basic knowledge which trade unions need for enabling and sustaining dialogue with the government and other stakeholders including employers has been largely achieved throughout the project implementation. It is worth nothing in this regard that most of the interviewed stakeholders, including independent trade unions, could not recognize a specific commencement date of this project. As put by the head of the independent trade union for workers in Northern municipalities, “the Phenix center is a partner, not a supplier of activities or trainings; they supported the emergence of independent trade unions since the very beginning and all the way up until now” (interview, Irbid, 3 July 2018).

The overall feedback provided by the majority of stakeholders interviewed was holistic to the overall Phenix contribution to the trade union movement and rights of workers. As put by a CIS staff member, “the Phenix center works on a cause, not a project”, which sums up the rights-based approach that is adopted by the center and ensures a great deal of sustainability to the contribution to the cause, rather than the project.

Having said that, the review of the policy papers and research briefs showed that they are rather heavy and not particularly user-friendly for union leaders.

In addition, the Phenix center seems to lack a strong team dedicated to their causes, while most of their substantive work, considerable in itself, seems to be solely undertaken by the director of the center, Mr. Ahmad Awad, which poses serious questions to the sustainability of the center, rather than the project itself. The communication of the Phenix center also needs considerable revamp which would serve to better showcase the success of their interventions.

VI. CONCLUSIONS

RELEVANCE

Key question: To what extent is the project strategy relevant to the needs identified?

The project “Enhancing Freedom of Association among Emerging Trade Unions” implemented by the Phenix Center is highly relevant to the needs of independent trade unions. As capacity and leverage of independent trade unions are limited and underdeveloped, the focus by the Phenix Center on building their capacities and developing their skills is key, especially given findings that project induced positive changes in the positioning of independent unions. Phenix adoption of a 3D approach – direct capacity building intervention, knowledge production, and advocacy efforts including media – is essential but can be further enhanced.

EFFECTIVENESS

Key question: To what extent did Phenix Center's strategy achieve planned outcomes and impact? Why and why not? Are there any unintended results of the project?

The Phenix Center’s strategy did achieve the planned outcomes, and to a large extent, contributed to the impact of putting labor rights back on the agenda.

Improvement in skills related to communication, collective bargaining, negotiations, mobilization and ability to build strong arguments. Project contributed to eliciting individual (mainly union leaders) success stories, including some women, very proud of their advancement in self-confidence, leadership and representation. Unionists showed a lot of enthusiasm when talking about the project and the behavioral change was obvious to trainers and project stakeholders, except for MP.

The project significantly contributed to the overall strengthening of the Emerging Trade Union Movement. This was particularly the case in the understanding of international standards and commitments and Jordanian legislations favorable to the freedom of association, leadership, and collective bargaining. Less impact was shown in communication and gender-related issues.

The training structure was extremely beneficial to induce positive changes. Trainings followed by coaching sessions, as well as constant support from Phenix leadership contributed to building a complex set of skills for trade unions, enabling them to play a leading role in the trade union movement: *“The Phenix project created strong union leaders”*.

The project induced awareness among unionists and indirectly encouraged a large movement of mobilization. In many cases, victories were made by unions throughout the project lifetime, which encouraged mobilization and recruitment of new members. However, the channels of communication across unions are weak, and little is known about achievements.

The advocacy approach of the project was relatively effective in enhancing women participation in unions. However, fear remains more pronounced in women circles rather than in men ones, especially in relation to the “illegal” status of the unions. In addition, patriarchal practices persist inside trade unions, with a limited number of women union leaders, and societal norms acting as impeding elements for women participation, despite commitments to gender quota and gender equality. In this regard, women seem to keep a low profile when it comes to leading public activities

that have a political aspect, while men directly or indirectly intimidates women under different pretexts, mainly family obligations, societal norms and the widespread perception based on which women always need protection, from men as it happens.

SUSTAINABILITY

Key question: What is the likelihood that the benefits from the program will be maintained for a reasonably long period of time, after the end of the project? Why and why not?

It is very likely that the benefits of the program will persist after the end of the project. The Phenix Center is perceived by independent trade unions as a long-term partner and an important support for their cause. As a matter of fact, most of the stakeholders interviewed were unable to identify the start and end date of the project, which shows that the support has been ongoing ever since these trade unions have started to emerge. It is worth noting that the support was continuous during the evaluation, 2 to 3 months after the project officially closed; which shows that the Phenix Center is fully supportive of the cause of labor rights and freedom of association, rather than being an institution that is implementing just another project.

The changes observed at the level of heads of unions knowledge, attitude and behavior are perennial. It was obvious throughout interviews that the project introduced structural changes at the individual as well as institution level inside the trade unions which are very likely to persist beyond the project lifetime. For example, change in leadership of the union was observed in some unions, with no major clashes of ensuing conflicts. The approach to demanding reforms in laws and regulations also became more methodical and organized.

The policy papers produced by the project are also a good reason why the benefits of the program are most likely to be maintained after the end of the project, as most of them serve as solid and rich content for future negotiations, especially that socio-economic issues, such as tax policies, are currently at the heart of the public debate, and it is expected that independent trade unions will play a growing role in setting the agenda for labor rights and sound economic policies.

VII. RECOMMENDATIONS

Invest in Achievements

Expand inclusion and widen involvement of current independent trade unions, establishing a strong knowledge base and a general culture of peaceful rights-based activism before shifting to other unions. The independent trade unions, along with the Phenix Center, are particularly well positioned to advocate with the Ministry of Labor and other actors involved in enhancing the freedom of association to change the legislations accordingly.

Shape existing activities and add new activities to enhance inclusion, such as periodic technical trainings open to new recruits, or alternatively form a number of trainers inside unions to undertake this educational role within unions in a regular manner.

Increase presence and enhance political / social positioning of independent trade unions, as to expedite the process of official recognition, while at the same advocate for the freedom of association, based on the GOJ international commitments and basic principles of human rights.

Undertake Surgical Improvements

Build cross sectoral alliances and create permanent channels for communication and exchange of information amongst independent trade unions. Engage all relevant stakeholders in this through a participatory design process, whereby trade unions would regularly connect with each other in a cycle for learning, information exchange and support.

Broaden institutional capacity of the Phenix Center: While the Phenix Center emerges as a the main think tank working on issues related to the rights of workers and labor in general, it is important that this center works on an institutional sustainability plan and actively works towards the emergence of a middle leadership inside the organization that could further support the achievement of their mission and vision. This should also include serious revamp of the center's communication strategy to better demonstrate their success and achievements.

Build on the current political / social and economic changes to increase advocacy efforts related to freedom of association and labor rights: independent trade unions might have nowadays an important opportunity to position themselves and make themselves heard, given the current changes. It is important to delicately assess the situation and plan a multi-stakeholders advocacy intervention.

Produce user-friendly policy positions and build ownership of TUs over the production of knowledge. It is crucial that independent trade unions feel more ownership over the production of knowledge and further realize the importance of evidence-based data and analysis of information for supporting policy positions and strengthening their arguments whether in situations of collective bargaining or exposing their issues and contentions.

Focus on shortcomings

Build organizational capacity to comprehensively incorporate a gendered approach to trade union activism. Introduce concept of gender in terms of mutual perception, relations and assigned social roles, and address stereotypes in a way that contributes to their transformation by examining alternative role models.

This includes i) ***addressing gender issues inside trade unions*** such sexual harassment that women face in their workplace, which has not yet been incorporated in the trade union internal culture, and ii) ***ensuring that women freely access leadership positions*** inside unions without exclusion or patriarchal pressure.

In addition, it is extremely important to come up with a specific ***gender strategy*** to reach out to women workers and encourage them to engage in the independent trade unions, while taking into account a ***specific outreach messaging*** for women based on the concerns expressed by women.

Address imminent issues through a consolidated conflict resolution and governance coaching. This can serve to counter any possible risks of implosions inside unions, as well as addressing conflicts and build their capacity to proactively manage tensions and differences. Mechanisms to impede any possible personification of trade unions should be also found and activated, in a participatory and inclusive manner.

ANNEXES

Annex I: Evaluation Scope of Work

Request for Quotation/Scope of Work

Summative Independent Evaluation for the Project “Enhancing Freedom of Association among Emerging Trade Unions” Implemented by Phenix Center for Economic & Informatics Studies

Under this RFQ, USAID CIS is commissioning evaluation support to carry out the implementation of a summative independent evaluation for one of the Democracy, Rights, and Governance Grants issued to Phenix Center for Economic & Informatics Studies to implement the project: *Enhancing Freedom of Association among Emerging Trade Unions*.

A. SCOPE OF WORK

A.1 Background on Phenix's Grant

The Phenix Center for Economic & Informatics Studies (Phenix Center) is a Jordanian non-governmental organization committed to independent policy research and to the assessment of the national public opinion on impactful current issues emerging in the economic and social areas, considering the legislative environment in Jordan. In order to fulfill its core mission of promoting the creation of a society based on democratic principles and human rights, Phenix Center works actively in various relevant fields including monitoring and reporting on labor rights, enhancing the capacity of political parties, improving the performance of civil society organizations, and conducting mission-aligned studies, surveys, and public opinion polls.

Phenix responded to USAID CIS' open competition for Democracy, Rights and Governance Request for Applications and received an award for its project entitled “Enhancing Freedom of Association among Emerging Trade Unions”. The project was implemented in two phases:

- Phase I aimed at fostering workers’ rights and enhancing their right to association through building the capacities of the newly established or independent trade unions in Jordan. (July 1, 2014 - December 31, 2014)
- Phase II focused on strengthening the operational capacity of the newly established unions. This included democratic elections and management that would guarantee a fair chance for marginalized groups including, but not limited to, women, youth, and persons with disabilities. (December 1, 2015 - March 30, 2018)

Background of the Project: The country’s democratic transition needs to be supported by the establishment of social powers and groups that can mobilize and support the demands of democratic transition. Jordan with its political and social structure lacks these social powers. Political parties, activism movements, and civil society were not successful enough to fully accomplish this job since they lack social weight on the ground. These social groups were not able to develop because of the restrictions on the freedom of association. The traditional opposition powers have a political agenda and demands for democratic transition, but lack social and economic programs on their agenda. Building the capacities of trade unions will force the political powers to develop a program that takes into consideration the demands of these groups, i.e. decent work condition and social security, which represent the social weight supporting democratic transition.

For additional details on the project, including research papers and draft laws produced under the grant, can be found in the attachments:

- Overview of Phenix Project (Attachment 1)
- Draft Law to regulate trade unions in Jordan (Attachment 2)
- Identification and analysis of legislative framework (Attachment 3)
- Mapping of trade and labor unions in Jordan (Attachment 4)
- Research Paper on Union Stakeholders (Attachment 5)
- Best Practices for trade unions (Attachment 6)

A.2 Purpose and Scope:

USAID CIS is commissioning a final evaluation of Phenix Center two-phased project “**Enhancing Freedom of Association among Emerging Trade Unions**” which took place between July 2014 and March 2018. The purpose of this evaluation is to provide an independent, in-depth assessment of the strategy and impact of the thematic area’s related activities, and to provide the Phenix Center’s staff and its donor sufficient information about the performance of the program (relevance, effectiveness and sustainability), lessons learned and practical recommendations for follow-up strategies related to civil society strengthening. Specifically, this final evaluation aims to:

- a. **Determine** Phenix project performance in terms of achieving intended targets and results as stated in the project’s Results Framework;
- b. **Assess the effectiveness** of the advocacy methodology, advocacy process and advocacy elements (research, capacity building, and dialogue) and the extent to which each of these elements has contributed to the achievement of the advocacy results;
- c. **Assess the extent** to which Phenix has applied Human Rights Based Approach (HRBA) and GEFE principles to grant management and implementation processes;
- d. **Identify** challenges faced by the project teams in achieving the program’s objectives;
- e. **Make recommendations** on replicability in terms of achievements, addressing gaps and challenges.

The evaluation process, findings and recommendations will provide essential content for Phenix Center, as well as capture good practices and, lessons learned to enrich new projects that aim to enhance institutional capacity of Emerging Trade unions within the Civil Society sector of Jordan. It will also provide an independent, in-depth assessment of the performance (relevance, effectiveness and sustainability) of Phenix Center efforts towards advancing the Law to Regulate Trade Unions in Jordan.

The findings of the evaluation will be shared with and used by Phenix Center, USAID, its implementing partners, as well as relevant stakeholders.

A.3 Evaluation Questions

The evaluation should address questions related to the project’s relevance, effectiveness, and sustainability. Some of the key questions in each of these areas are set out below, however they are provided as guidance and should be further refined with the successful offeror and will be reviewed and finalized with Phenix Center’s management as part of the inception report.

A.3.1 Relevance

Key question: To what extent is the project strategy relevant to the needs identified?

a. To what extent were Phenix's project outcomes, outputs and activities relevant and strategic within the context? To what extent did the grantee adapt to address changes in the context?

- Coherent with international obligations
- Coherent with USAID, USAID/Jordan and CIS's Human Rights and Gender policies and priorities
- Coherent with GoJ national agenda, law, policies, and strategies
- Appropriate socio-cultural sensitivity
- Appropriate assumptions and consideration of major risks, challenges and potential negative consequences

b. To what extent have union members been satisfied with the results of the project?

c. Were there any other factors that should have been taken into account when designing the project?

A.3.2 Effectiveness

Key question: To what extent did Phenix Center's strategy achieve planned outcomes and impact? Why and why not? Are there any unintended results of the project?

- f. To what extent did the Phenix Center training activities contribute to the overall strengthening of the Emerging Trade Union Movement?
- g. How did Phenix Center's training structure (training workshops followed by a practical application/coaching for trade unions) enhance learning and advance intended results?
- h. How did Phenix Center's awareness and advocacy strategy provide the intended results?
- i. To what extent was Phenix Center advocacy approach effective in promoting an inclusive approach to enhance women participation in unions?
- j. To what extent were dialogues and workshops between stakeholders (Unionists, Workers, Government and Parliamentarians) successful in advocating for the need to change existing laws in light of the constitutional amendments?

A.3.3 Sustainability

Key question: What is the likelihood that the benefits from the program will be maintained for a reasonably long period of time, after the end of the project? Why and why not?

- e. What examples demonstrate sustaining change within Emerging Trade Unions?
- f. What specific skills gained by Unions Leaders are likely to be maintained in the longer term?
- g. Are the newly established union policies inclusive by covering the all aspects of the trade unions and to what extent do they support achieving the trade union's visions?
- h. How did the project outcomes provide solid and rich content (policy and research) to enable and sustain dialogue with the government?

A.4 Elements of an Approach (Methodology)

The successful offeror will conduct field missions throughout Jordan with logistical support from the Phenix Center's staff based in Amman, Jordan. The desire is for a goal-based evaluation with participatory elements that allows maximum participation of diverse stakeholders, beneficiaries and Phenix Center's project staff. The detailed methodology will be set out in the inception report. Stakeholders, beneficiaries and Phenix Center's project staff will be consulted throughout the evaluation process. Trade Unions, Phenix Center's project staff, and individuals who partnered with Phenix Center's on the implementation of this program will also be selected to participate and provide feedback.

The elements below will inform the methodology that is applied in the groups that consist of men and women from different geographic areas:

- a. Desk review of all relevant documents on the project including the original USAID Program Description; Phenix Center annual work plans and quarterly reports; existing M&E data, including quarterly statistics, mid-term and end-of-project reports; as well as consultant/trainer reports and other relevant program documents. This will be done prior to conducting focus groups or individual interviews.
- b. Field visits throughout Jordan.
- c. Interviews with selected CSOs, partners and Phenix Center's project staff.
- d. Focus groups with selected CSOs, partners and Phenix Center's project staff.
- e. Phone survey (TBD) of stakeholders based on a short, simple questionnaire that assesses stakeholder responses to the project's key activities, processes, and results.

USAID CIS will facilitate the following with Phenix Center and the successful offeror:

- The provision of the required set of documents to be reviewed for the evaluation;
- The provision of a list of project partners, beneficiaries, and stakeholders in order to enable the evaluation consultant to select particular individuals for interviews/meetings;
- Introductions to selected partners, stakeholders, and beneficiaries to be invited for key informant interviews and focus groups.

A.5 Ethics and Safety

A.5.1 Code of Conduct

It is expected that the evaluators will respect the following ethical code of conduct:

- **Independence:** evaluators shall ensure that independence of judgment is maintained and that evaluation findings and recommendations are independently presented.
- **Impartiality:** evaluators shall operate in an impartial and unbiased manner and give a balanced presentation of strengths and weaknesses of the policy, program, project or organisational unit being evaluated.
- **Conflict of Interest:** evaluators are required to disclose in writing any past experience, which may give rise to a potential conflict of interest, and to deal honestly in resolving any conflict of interest which may arise.
- **Honesty and Integrity:** evaluators shall show honesty and integrity in their own behaviour, negotiating honestly the evaluation costs, tasks, limitations, scope of results likely to be

obtained, while accurately presenting their procedures, data and findings and highlighting any limitations or uncertainties of interpretation within the evaluation.

- **Competence:** evaluators shall accurately represent their level of skills and knowledge and work only within the limits of their professional training and abilities in evaluation, declining assignments for which they do not have the skills and experience to complete successfully.
- **Accountability:** evaluators are accountable for the completion of the agreed evaluation deliverables within the timeframe and budget agreed, while operating in a cost effective manner.
- **Confidentiality:** evaluators shall respect people's right to provide information in confidence and make participants aware of the scope and limits of confidentiality, while ensuring that sensitive information cannot be traced to its source.
- **Avoidance of Harm:** evaluators shall act to minimize risks and harms to, and burdens on, those participating in the evaluation, without compromising the integrity of the evaluation findings.
- **Accuracy, Completeness and Reliability:** evaluators have an obligation to ensure that evaluation reports and presentations are accurate, complete and reliable. Evaluators shall explicitly justify judgments, findings and conclusions and show their underlying rationale, so that stakeholders are in a position to assess them.
- **Transparency:** evaluators shall clearly communicate to stakeholders the purpose of the evaluation, the criteria applied and the intended use of findings. Evaluators shall ensure that stakeholders have a say in shaping the evaluation and shall ensure that all documentation is readily available to and understood by stakeholders.
- **Omissions and wrongdoing:** Where evaluators find evidence of wrong-doing or unethical conduct, they are obliged to report it to the proper oversight authority.

A.5.2 Data Collection Protocol

In line with the ethical code of conduct, the evaluator shall develop data collection and any other necessary protocols that are appropriate for engaging with the Task Order's wide variety of stakeholders, including provisions for obtaining informed and voluntary consent from participants. During data collection and other Task Order activities, special attention shall be given to identifying, interacting with and protecting vulnerable or at risk participants or potential participants.

B. PERFORMANCE AND DELIVERABLES

The estimated effective date for this Activity is on or about April 22, 2018 through July 15, 2018. The place of performance of the activity is Jordan. The evaluator must submit reports, deliverables or outputs as further described below to the Technical Monitor for approval by the Technical Monitor. All reports shall be submitted electronically in unlocked MS Word or Excel formats (as specified by USAID CIS and as appropriate to the nature of the document). The evaluator must promptly notify the Technical Monitor of any problems, delays or adverse conditions that materially impair the evaluator's ability to meet the requirements.

B.1. Deliverables

The evaluator will produce the deliverables outlined below (in English), all of which will be reviewed and approved by the USAID CIS Technical Monitor with input from Phenix:

1. Inception report in which the successful offeror will finalize the methodology, general evaluation questions, data collection tools and work plan, and address any outstanding issues. The inception report plan should include an outline for the overall evaluation report that will be produced at the end of the desk review.
2. Preliminary findings for each of the stated evaluation questions in accordance to a format to be determined by the Phenix Center's staff and consultant.
3. Oral Presentation describing key findings and data limitations around the evaluation questions, and general conclusions based on thematic findings.
4. Draft Evaluation Report that addresses the evaluation questions, analyses and synthesizes the findings and lessons learned, draws conclusions, and makes recommendations. The main body should not exceed 30 pages, excluding the executive summary and annexes.
5. An integrated Final Evaluation Report and Executive Summary that addresses any issues raised from the review of the draft report. The final report should be formatted according to USAID's standard evaluation reporting format (see USAID guidelines for constructing and evaluation report: Attachment 9)

The reports will be reviewed by the USAID CIS management team and Technical Monitor and approved by the Technical Monitor

The evaluator shall be responsible for taking part in, at a minimum, monthly meetings/Skype calls with the Technical Monitor, and possibly more frequently if deemed by necessary by the Technical Monitor.

B.2 TECHNICAL MONITOR

The Technical Monitor is the only person responsible for the technical directions and oversight of this assignment. The Technical Monitor is Kinda Jaradat, Senior M&E Specialist/USAID CIS, Email: kjaradat@fhi360.org.

(a) Technical Directions is defined to include:

- Written directions to the Evaluator which fill in details, suggest possible lines of inquiry, or otherwise facilitate completion of work;
- Provision of written information to the Evaluator which assists in the interpretation of specifications or technical portions of the work statement;
- Review and, where required, provide written approval of technical reports, specifications or technical information to be delivered. Technical directions must be in writing, and must be within the statement of work as detailed above.

(b) The Technical Monitor is authorized to take any or all action with respect to the following except any action specifically prohibited by the terms of this Contract:

- Assure that the Contractor performs the technical requirements of the Contract in accordance with the Contract terms, conditions, and specifications.

- Perform or cause to be performed, inspections necessary in connection with the Contractor's performance and to direct the Contractor to correct all deficiencies; perform acceptance for the FHI 360.
- Maintain all liaison and direct communications with the Contractor. Written communications with the Contractor and documents must be signed as "Technical Monitor".
- Monitor the Contractor's production or performance progress and notify the Contractor in writing of deficiencies observed during surveillance, and direct appropriate action to effect correction.

C. REQUEST FOR QUOTATION

C.1. QUALIFICATIONS

The following qualifications are required in the evaluator:

- Thorough understanding of democracy, rights and governance as well as gender
- Excellent communication skills and demonstrated ability to facilitate group discussions.
- Demonstrated ability to produce high quality evaluation reports, including recommendations for future work
- Experience and understanding of the regional and sub-regional context
- Fluent in English and Arabic with high level reporting skills

The evaluator will have primary responsibility for designing and administering all data collection tools, tabulating the results and other necessary tasks including analysis of results, preparing the draft and final report, as well as presenting the findings to Phenix's executive leadership/board, USAID CIS staff and USAID/Jordan representatives.

C.2. INSTRUCTIONS FOR THE PREPARATION OF A QUOTATION

The evaluator should submit a short proposal that describes the initial approach toward the evaluation, estimated level of effort (LOE), and implementation timeframe:

- **Technical Approach:** Provide a summary of the proposed evaluation design; additions or changes to the main evaluation questions, illustrative sampling plan; data collection methods and tools; data analysis techniques; and reporting. Describe potential evaluation limitations/biases and suggested responses.
- **Planning and implementation:** Outline a proposed evaluation workplan including estimated level of effort for each phase (as outlined below) and proposed implementation timeframe (with final report and oral presentation to be completed by June 30, 2018 if possible or July 15, 2018 at the latest.

Assignment Phase	Total Anticipated Level of Effort (8 hour days)	LOE by Month			
		April	May	June	July

Evaluation Design (Phase 1)					
Data Collection (Phase 2)					
Data Analysis (Phase 3)					
Reporting (Phase 4)					

- Evaluator must submit an updated CV and 1420 biodata form.

D. LIST OF ATTACHMENTS

Attachment 1: Overview of Phenix Project
 Attachment 2: Draft Law to regulate trade unions in Jordan
 Attachment 3: Identification and analysis of legislative framework
 Attachment 4: Mapping of trade and labor unions in Jordan
 Attachment 5: Research Paper on Union Stakeholders
 Attachment 6: Best Practices for trade unions
 Attachment 7: Constructing an Evaluation Report
 Attachment 8: FHI 360 1420 Biodata Form

Annex II: Interview Protocols and Focus group Discussion Guides

Discussion Guide # 1

CIS staff

- 1- How would you describe the “Enhancing Freedom of Association among Emerging Trade Unions” project in general?
- 2- In your opinion, what is the importance of this project? Why? What specific contextual need is it addressing?
- 3- What was the best / worst thing about it? Why? Please explain.
- 4- How do you assess the overall 4D approach (research, training and coaching, mobilization and advocacy/lobbying)? Which aspect was the most / least impactful? Why?
- 5- How do you assess the capacity of Phenix Center to undertake such a project? What can you tell me about any potential continuation of the project?
- 6- From your perspective, how were the trainings delivered in terms of quality and relevance to trade unions’ needs? Please explain. What were the major highlights and major shortages in terms of training? Why and how?
- 7- What are your thoughts on coaching which was done as part of this project? Please provide details.
- 8- Let us talk a bit about the research and policy papers that were issued. What do you think of them? What is the added value of these pieces? Who were the primary audience and how did it contribute to fostering workers’ rights and enhancing their right to association in Jordan?
- 9- In terms of mobilization, how impactful were these efforts? Can you please give me examples?
- 10- How about the advocacy and lobbying component? How impactful was it? Please explain and provide examples.
- 11- Tell me more about the media / public opinion sensitization component. What do you think of these activities?
- 12- Please tell me more about the gender component in this project. How was it taken? What were the major challenges and major opportunities? How do you personally feel about this?
- 13- On a scale from 0 (lowest) to 5 (highest), where would you rate the project effectiveness in terms of accomplishment of goals and objectives? Why?
- 14- In brief, what are the 5 main achievements of this project and the five main aspects where it did not achieve much? What makes you say that?
- 15- If you were to rethink this project, what would you do differently? Why?
- 16- Any other thoughts you would like to share with me?

Discussion Guide # 2

Phenix Center staff

- 1- Why did you think of the “Enhancing Freedom of Association among Emerging Trade Unions” project at the first place? What did you want to achieve?
- 2- Can you please explain the project process? How were these unions identified and why?
- 3- Can you please tell me what was the role of Solidarity Center, Jordan Independent Trade Union Confederation, Himam, the Civil Society Coalition in Jordan and INSAN Coalition for UPR in this project?
- 4- In your opinion, what is the importance of this project? Why? What specific contextual need is it addressing?
- 5- What was the best / worst thing about it? Why? Please explain.
- 6- What made you adopt the overall 4D approach (research, training and coaching, mobilization and advocacy/lobbying)? Which aspect was the most / least impactful? Why?
- 7- How do you assess the capacity of Phenix Center to undertake such a project? What can you tell me about any potential continuation of the project?
- 8- What do you think of CIS as a donor / partner? How do you assess your encounters / relations with them?
- 9- How is this project relevant to international obligations and UPR recommendations for the government of Jordan? How did it make use of this?
- 10- From your perspective, how were the trainings delivered in terms of quality and relevance to trade unions’ needs? Please explain. What were the major highlights and major shortages in terms of training? Why and how?
- 11- What did trade unions benefit from versus what was the least beneficial? Any anecdotes from trade unions that you can share with me?
- 12- How do you assess the relation with trade unions? What challenges, if any did you face? How do you assess the ownership of trade unions over this project in general?
- 13- How did politics affect, positively or negatively, this project? Why and How? Please explain.
- 14- Please tell me more about the gender component in this project. How was it taken? What were the major challenges and major opportunities? How do you personally feel about this?
- 15- What are your thoughts on coaching which was done as part of this project? Please provide details.
- 16- Let us talk a bit about the research and policy papers that were issued. What is the added value of these pieces? Who were the primary audience and how did it contribute to fostering workers’ rights and enhancing their right to association in Jordan? How did these papers contribute to the dialogue with the Parliamentary committee? Please explain.
- 17- In terms of mobilization, how impactful were these efforts? Can you please give me examples?
- 18- How about the advocacy and lobbying component? How impactful was it? Please explain and provide examples.
- 19- To what extent were dialogues and workshops between stakeholders (Unionists, Workers, Government and Parliamentarians) successful in advocating for the need to change existing laws in light of the constitutional amendments?
- 20- Tell me more about the media / public opinion sensitization component. What do you think of these activities?
- 21- On a scale from 0 (lowest) to 5 (highest), where would you rate the project effectiveness in terms of accomplishment of goals and objectives? Why?
- 22- In brief, what are the 5 main achievements of this project and the five main aspects where it did not achieve much? What makes you say that?
- 23- If you were to rethink this project, what would you do differently? Why?
- 24- Any other thoughts you would like to share with me?

Note: trade unions will be asked to provide exact numbers of males and females, in various positions, in addition to age brackets, and number of people with disabilities.

Discussion Guide # 3

Beneficiary Trade Unions

- 1- What do you think of the “Enhancing Freedom of Association among Emerging Trade Unions” project in general? Why?
- 2- In your opinion, what is the importance of this project? Why? What specific contextual need is it addressing?
- 3- What was the best / worst thing about it? Why? Please explain.
- 4- In brief, what was the project about? And what was your role in it?
- 5- How do you assess the capacity of Phenix Center to undertake such a project? What can you tell me about any potential continuation of the project?
- 6- From your perspective, how were the trainings delivered in terms of quality and relevance to your needs? Please explain. What were the major highlights and major shortages in terms of training? Why and how?
- 7- What are the major learning outcomes of these trainings? Can you give me examples please?
- 8- What did you benefit from versus what was the least beneficial?
- 9- How do you assess the relation with Phenix center? What challenges, if any did you face? How about the relations amongst trade unions? Any challenges, success stories? Please provide examples.
- 10- How did politics affect, positively or negatively, this project? Why and How? Please explain.
- 11- Please tell me more about the gender component in this project. How was it taken? What were the major challenges and major opportunities? How do you personally feel about this?
- 12- What are your thoughts on coaching which was done as part of this project? Please provide details.
- 13- Let us talk a bit about the research and policy papers that were issued. What is the added value of these pieces? Who were the primary audience and how did it contribute to fostering workers’ rights and enhancing their right to association in Jordan?
- 14- In terms of mobilization, how impactful were these efforts? Can you please give me examples?
- 15- How about the advocacy and lobbying component? How impactful was it? Please explain and provide examples.
- 16- To what extent were dialogues and workshops between stakeholders (Unionists, Workers, Government and Parliamentarians) successful in advocating for the need to change existing laws in light of the constitutional amendments?
- 17- Tell me more about the media / public opinion sensitization component. What do you think of these activities?
- 18- On a scale from 0 (lowest) to 5 (highest), where would you rate the project effectiveness in terms of accomplishment of goals and objectives? Why?
- 19- In brief, what are the 5 main achievements of this project and the five main aspects where it did not achieve much? What makes you say that?
- 20- If you were to rethink this project, what would you do differently? Why?
- 21- Any other thoughts you would like to share with me?

Specific Section for female unionists

- 1- Please tell me about your participation in trade unions.
- 2- What are the main challenges and opportunities that you face as a woman unionist? Why? Please provide examples. How were you able to overcome these challenges?
- 3- Do you think that this project contributed to changing the level of your participation in union activities? How inclusive was the project approach in that sense? Please explain.
- 4- Were you personally engaged in recruiting other women in the union?
- 5- Do you feel you were equally targeted in training, coaching and mobilization? Why and how?
- 6- How active do you consider yourself as a unionist? Why?
 - a. If not active, what would make you become more active?

- b. What can the project do in this regard?
- 7- Do you think women are more or less interested in trade unions activism? How would you feel if the head of your union was a female? Why?
- 8- What is your current role in the union and would you envisage running for a leadership position in your trade union? Why / why not?

Note: trade unions will be asked to provide exact numbers of males and females, in various positions, in addition to age brackets, and number of people with disabilities.

Specific section for new recruits in various trade unions

- 1- What do you think of your trade union? What made you join? Why?
- 2- How do you assess the efforts done for mobilization of larger numbers of unionists? Why? Please explain and provide examples.
- 3- Do you think the efforts were more addressed towards men or women? Why and how?
- 4- Do you think women are more or less interested in trade unions activism? How would you feel if the head of your union was a female? Why?

Interview Guide # 4

National Institutions

- 1- What do you think of the “Enhancing Freedom of Association among Emerging Trade Unions” project in general? Why?
- 2- In your opinion, what is the importance of this project? Why? What specific contextual need(s) is it addressing?
- 3- How do you assess the capacity of Phenix Center to undertake such a project? What can you tell me about any potential continuation of the project?
- 4- From your perspective, how did the project address the needs of trade unions? Please explain.
- 5- How do you assess the relation with Phenix center? What challenges, if any did you face? How about your relations with trade unions? Any challenges, success stories? Please provide examples.
- 6- How did politics affect, positively or negatively, this project? Why and How? Please explain.
- 25- How does this project actually fit into the Jordanian laws and legislations as well as international commitments including UPR recommendations?
- 26- How useful were these papers for the dialogue between the Parliamentary committee and trade unions? Please explain.
- 7- Are you aware of the gender component in this project? How active are female unionists versus male unionists? Why is this case in your opinion? How do you personally feel about a greater women participation in trade unions activism, including at the leadership level?
- 8- Let us talk a bit about the research and policy papers that were issued. What is the added value of these pieces? Who were the primary audience and how did it contribute to fostering workers’ rights and enhancing their right to association in Jordan?
- 9- To what extent were dialogues and workshops between stakeholders (Unionists, Workers, Government and Parliamentarians) successful in advocating for the need to change existing laws in light of the constitutional amendments? Please provide your point of view as MPs.
- 10- Tell me more about the media / public opinion sensitization component. What do you think of these activities?
- 11- On a scale from 0 (lowest) to 5 (highest), where would you rate the project effectiveness in terms of accomplishment of goals and objectives? Why?
- 12- In brief, what are the 5 main achievements of this project and the five main aspects where it did not achieve much? What makes you say that?
- 13- If you were to rethink this project, what would you do differently? Why?
- 14- Any other thoughts you would like to share with me?

Discussion Guide # 5

Media

- 1- How would you describe the “Enhancing Freedom of Association among Emerging Trade Unions” project in general?
- 2- In your opinion, what is the importance of this project? Why? What specific contextual need is it addressing?
- 3- How do you assess the capacity of Phenix Center to undertake such a project? What can you tell me about any potential continuation of the project?
- 4- Let us talk a bit about the research and policy papers that were issued. What do you think of them? What is the added value of these pieces? Who were the primary audience and how did it contribute to fostering workers’ rights and enhancing their right to association in Jordan?
- 5- Tell me more about the media / public opinion sensitization component. What do you think of these activities? From your perspective what impact did they have? Did you feel at any point that people started to know more about these topics?
- 6- Please tell me more about the gender component in this project. How was it tackled in media? In your opinion what are the major challenges and major opportunities?
- 7- On a scale from 0 (lowest) to 5 (highest), where would you rate the project effectiveness in terms of accomplishment of goals and objectives? Why?
- 8- In brief, what are the 5 main achievements of this project in terms of communication and media outreach and the five main aspects where it did not achieve much? What makes you say that?
- 9- If you were to rethink this project, what would you do differently? Why?
- 10- Any other thoughts you would like to share with me?

Annex III: Trip reports 1 & 2

USAID Civic Initiatives Support Program
“Enhancing Freedom of Association among Emerging Trade Unions”
Phenix Center for Economic and Informatics Studies
Summative Evaluation
Trip report by Zeina El-Helou
31 May 2018

In reference to the inception report delivered on 21 May 2018 and revised on 23 May 2018, the first phase of data collection started on 28 May 2018 until 31 May 2018.

The table below summarizes the group discussions and key informant interviews that took place during the first trip.

Date	Stakeholder	location	Duration
28/05/2018	CIS staff Hala Ghosheh Kinda Jaradat, Lama Sidawi, Diala Alami	CIS offices	90 minutes
28/05/2018	Phenix Staff	Phenix offices	2 hours
28/05/2018	Phenix trainers (3 persons)	Phenix offices	2 hours
29/05/2018	Focus group with newly joined unionists (workers in agriculture) females and males	Northern Jordan Valley	1 hour
29/05/2018	Focus group with general assembly (workers in agriculture) males and females	Northern Jordan Valley	1 hour
29/05/2018	Focus group with union leaders (workers in agriculture)	Northern Jordan Valley	1 hour
29/05/2018	Interview with head of union (workers in agriculture)	Northern Jordan Valley	45 minutes
30/05/2018	Focus group with unions leadership (3 males) (Taxi drivers and phosphate workers)	Phenix Offices	1h 45 min
30/05/2018	Focus group with female unionists (3 females) (workers in health sector)	Phenix Offices	45 minutes
30/05/2018	Interview with Ahmad Awad	Phenix Offices	75 minutes
31/05/2018	Interview with Samia Kurdi (media producer)	Phenix Offices	30 minutes

During the upcoming trip scheduled for 24 to 28 June 2018, the following interviews and focus group discussions should be scheduled:

Stakeholder
1- MP, rapporteur of Parliament’s Labor, Social Development and Population committee
2- Rania Sarayra, gender focal point
3- Interviews with heads of the following unions:
a. Independent Trade Union of Workers of the Northern Municipalities
b. Independent Trade Union of Workers in Railway
c. Independent Trade Union of Artists
d. Independent trade Union of Workers in Tourism Sector
e. Independent Trade Union of Workers in Agriculture (public Sector)
f. The Preparatory Committee of Imams Union
4- Focus group with new recruits – trade unions in the center
5- Focus group with new recruits males – trade unions in the North
6- Focus group with new female unionists – trade unions in the North
7- Focus group with unions leadership (who attended trainings) – trade unions in the North
8- Interview with Solidarity Center
9- Interview with INSAN coalition for UPR

During the second trip as well, a presentation of the preliminary findings should be scheduled on the last day. In addition, further documents were requested from Ahmad Awad as follows:

- 1- Geographical and gender distribution of trade unions
- 2- Baseline and post-training evaluation sheets
- 3- Training curricula
- 4- Available gender data

Documents related to media were also requested from the media producer:

- 1- Episodes scripts and list of guests
- 2- Review of social media interactions on posts related to episodes

USAID Civic Initiatives Support Program
“Enhancing Freedom of Association among Emerging Trade Unions”
Phenix Center for Economic and Informatics Studies
Summative Evaluation
Trip report by Zeina El-Helou
5 July 2018

In reference to the inception report delivered on 21 May 2018 and revised on 23 May 2018, the second phase of data collection started on 2 July 2018 until 5 July 2018.

The table below summarizes the group discussions and key informant interviews that took place during the second and last trip.

Stakeholder	Place and date of completion
10- MP, rapporteur of Parliament’s Labor, Social Development and Population committee	Phenix Center offices, 2 July 2018
11- Rania Sarayra, gender focal point	Phenix Center offices, 2 July 2018
12- Interviews with heads of the following unions: g. Independent Trade Union of Artists h. Independent trade Union of Workers in Tourism Sector i. The Preparatory Committee of Imams Union	Phenix Center offices, 4 July 2018
13- Focus group with new recruits males – trade unions in the North	Irbid, 3 July 2018
14- Focus group with new female unionists – trade unions in the North	Irbid, 3 July 2018
15- Focus group with unions leadership (who attended trainings) – trade unions in the North	Irbid, 3 July 2018
16- Interview with Independent Trade Union of Workers of the Northern Municipalities	Irbid, 3 July 2018
17- Interview with Independent Trade Union of Workers in Agriculture (public Sector)	Irbid, 3 July 2018

During the second trip as well, a presentation of the preliminary findings was delivered in CIS offices on 5 July 2018.