**TRADE UNIONS FOR A FAIR RECOVERY**

*Strengthening the role of trade unions in mitigating the impact*

*of the COVID-19 crisis*

**CALL FOR PROPOSALS**

**Background**

This call for proposals is launched in the context of an EU-funded Project “TRADE UNIONS FOR A FAIR RECOVERY: Strengthening the role of trade unions in mitigating the impact of the COVID-19 crisis”.

COVID-19 has underlined the importance of Social Dialogue in societies across Europe. While it has come to the forefront during the pandemic, it is crucial that effective social dialogue is at the heart of the National Recovery and Resilience Plans (NRRPS).

The pandemic has been asymmetrical, affecting different countries in different ways – hence the cascading nature of the fund. To adequately tackle this, strengthening the role of trade unions and social dialogue (bi- and tripartite) is crucial. This project is promoted by the ETUC – in partnership with the European Federation of Journalists (EFJ) – and is aimed to support capacity-building and empower trade union organisations. **Two parallel cascading schemes will be managed respectively by ETUC (via this call for proposals) and by the European Federation of Journalists (EFJ), to channel the capacity-building funds to the national level.**

**Established journalists’ unions and associations in EU Member States, UK, Iceland, Norway or in EU candidate countries (Albania, North Macedonia, Montenegro, Serbia and Turkey)** are invited to apply for the EFJ cascading grant by submitting a capacity-building workplan following this call. These workplans should aim to enable trade unions to meaningfully impact discussions surrounding national recovery strategies across Europe. More broadly, it is envisioned that workplans will also assist the development of digital trade unionism, supporting digital skills and digital tools of trade unions. This will overall build their capacity to effectively communicate with members and pursue a strengthened role in national social dialogue institutions.

**Objectives and expected results**

The overall purpose of this call is to promote national capacity-building workplans to ‘build back better’ by channelling funding to national-level trade union organisations (including journalists’ associations). **Capacity-building workplans must therefore incorporate activities which focus on key strategic issues with a view to achieve (at least one of) the following objectives:**

1. Build and **promote digital trade unionism**. This should broaden the range of digital tools available to (and strengthen the digital skills of) trade union officers, which will in turn strengthen their organising capacity, their communication with members and their role within national social dialogue institutions.
2. Strengthen **capacity-building for collective bargaining and social dialogue** when addressing the impact and mitigating the consequences of COVID-19 (at both national and EU level discussions). This initiative aims to support unions in their activities to shape national recovery plans that deliver secure jobs with decent pay and conditions.
3. **Enhance the visibility, outreach, organising capacity, and promote a stronger voice of Trade Unions in support of democracy**. This is particularly important in regions/countries where corruption and far-right extremism may be more prevalent and where trade union membership is low. Activities should empower trade unions to better combat corruption and protect whistleblowers.
4. Projects should also seek to investigate and tackle the impact COVID-19 has had on **women**, and onspecific social groups, especially **youth, and a-typical workers**.
5. Projects can address the broader challenge of journalists such as media violations from government Covid measures, hostilities from right-wing extremism and hate speech in the media through awareness-raising campaigns, training, etc.

The above will contribute to the consolidation of a strengthened role of social dialogue within future Social Partners’ agreements. It further foresees the enhanced involvement of Trade Unions at EU-level and national level in crafting NRRPs alongside the design and implementation of the European Pillar of Social Rights.

Lastly, with a view to the future, the anticipated outcomes will ensure that trade unions are better able to respond to the (green and digital) transitions and ensure fair restructuring processes. The role of collective bargaining and social dialogue, at bi- and tri-partite level, must have a continued presence in society – not just during times of crisis.

**Eligibility: organisations, types of activities, costs**

**Eligible organisations**

Cascading grant applicants must be based in an **EU Member States, UK, Iceland, Norway or in EU candidate countries** (Albania, North Macedonia, Montenegro, Serbia and Turkey).

Beneficiaries must be established journalists’ unions or associations representing workers in their national Social Dialogue institutions, affiliated to an EU-level social partner organisation consulted in accordance with Article 154 TFEU.

**Eligible projects and activities**

Capacity-building workplans should be minimum 12 months and maximum 15 months. The following types of activities will be eligible for funding:

* **Events, meetings, and training exercises** – including the preparation and participation in national bi- and tri-partite social dialogue bodies; internal coordination between confederations and unions/associations and sub-divisions/youth and regional branches/experts and institutes; outreach and awareness raising events; trade union training courses and seminars (e.g., digital tools or priority issues).
* **Communication and dissemination exercises** – developing online tools to strengthen the digital capacity of trade unions. Internally, this may cover the development of digital trade unionism, enabling confederations to enhance outreach and communication with members (e.g. via online platforms, intranets and databases). Externally, this may see the development of social media campaigns, e-newsletters and awareness raising exercises to reach new audiences.

* **Research and Expertise** – projects which envision relevant analytical research and/or build expertise are eligible for funding. This may also include research trips and study visits if deemed necessary by an organisation. However, this must constitute only part of the workplan. Subcontracting[[1]](#footnote-0) procedures are required and the amount must not exceed 40% of the overall budget.

**Eligible costs**

As indicated above, each applicant may apply for up to €60.000. All applicants must include a budget estimate for the activities foreseen in their capacity-building workplan (the budget template form, to be filled-in by applicants, is annexed to this call).

EFJ will provide financial support on the basis of (I) **“reimbursement of actual costs”** and the (II) **“simplified cost option (lump-sum approach and flat rate)”**, as defined by the European Commission.

1. The following costs are eligible under the **reimbursement of actual costs**:

* **Services** (expertise, interpretation, IT services, web platforms, audio-visual material, graphic design, creation of leaflets, etc)
* **Travel and subsistence** (where necessary in workplans)
* **Administrative costs** (room rentals, interpretation equipment)

These costs must be reported upon and documented with the relevant/corresponding invoices and reimbursement sheets. These documents must be submitted by the national

beneficiaries as each activity is completed, and at the latest at the end of the 2022 calendar

year (for the costs incurred in 2022) and at the end of the project (for the costs incurred in

2023).

1. To reduce administrative burden, the following costs are eligible for reimbursement under the **simplified cost option (lump-sum approach and flat rate)**:

* **Staff costs:** a lump sum, defined per type of activity will be used to reimburse grant beneficiaries for the work they invest in the coordination of activities under their respective workplans.
* **Overhead costs:** 7% of the budget estimated for the capacity-building workplans will be added to cover overhead costs of beneficiaries.

A realistic and reasonable lump sum has been established for **four different categories of activities**, each with varying sub-categories depending on the scale and scope of the event/activity. This has been carefully devised based on ETUC and EFJ’s experience in running events and activities.

A lump-sum should be used to reimburse the work and time invested by trade union officers into the organisation/coordination of capacity-building events/activities (See Annex X for more details). National beneficiaries must provide the following documentation for an event to be eligible for a lump sum reimbursement:

* An invitation and an agenda of the event/activity
* A signed list of participants or a screen capture showing participants’ names if the event/activity has taken place virtually
* A brief report, relaying key points and outcomes of the event/activity (a template will be provided)

**Budget available and awarding of cascading grants**

The total funding available, which EFJ will be able to cascade via this call for proposals, amounts to 320.000 EUR.

* Maximum amount per cascading grant: national applicants may request a **maximum of 60.000 EUR** to carry-out their national capacity-building workplans.
* Co-financing rate: the cascading grant may not exceed 95% of the total costs of the national capacity-building workplans. National applicants may decide to request lower co-financing rates. They must demonstrate that they have the financial capacity to implement the project and are able to cover their own contribution to the workplan.
* Funding applications submitted to EFJ for evaluation **will not be “ranked”** against one another. Instead, the co-financing rate will be adapted so that all workplans which meet the criteria can be funded. However, the EFJ may ask the applicant to adjust the requested amount if the applicant cannot demonstrate sufficient financial capacity to implement the full amount requested..
* If EFJ receives a lower amount of funding requests than the total budget available, another call may be published by EFJ, allowing for more capacity-building workplans to be funded.
* If an applicant submits an eligible application but of which the budget contains an error, the **EFJ secretariat will contact the national organisation to seek a clarification** and correct the error, so that a positive solution can be found.

**Evaluation and award process:**

**An evaluation committee (consisting of five members of the EFJ Steering Committee)** will be established and coordinated by EFJ who, upon submission, will assess cascading grant applications.

Applications will be evaluated against the following criteria, to assess whether the workplan is eligible for funding or not:

* Overall relevance of the capacity-building workplan in relation to the objectives outlined above. Activities planned must match the priority objectives and expected results of the call
* Measures should be in place for disseminating the outcomes of the capacity building workplan, and for ensuring a lasting impact (sustainability of results after EU funding ends)
* Measures should be in place for monitoring and evaluating workplan outcomes
* Mainstreaming of gender, youth and other vulnerable groups
* Cost-effectiveness

In addition, applicants must be able to demonstrate sufficient operational and financial capacity to be eligible for funding:

In terms of **financial capacity**, applicants must demonstrate that they have the sufficient accessible funds needed to maintain activities for the duration of the project and to co-finance as necessary. The financial capacity of each applicant will be evaluated upon:

* The last available balance sheet and/or financial report, approved by applicant’s executive committee or by an auditor
* The ratio between ‘total assets’, as stated clearly in the balance sheet, and the amount of cascading grant requested. Applicants are considered to have a strong financial capacity if the ratio is greater than or equal to 0.70

As for **operational capacity**, national beneficiaries must demonstrate sufficient professional competencies to implement and complete their workplan activities. The operational capacity of each applicant will be evaluated upon:

* A description of the organisation and structure, e.g., permanent staff, secretariat, staff dedicated to the project
* CV of the person in charge of the implementation of the workplan
* Organisations without a legal personality may still apply, but must provide a declaration on honour from a designated legal representative certifying that she/he can take on legal responsibility on behalf of the organisation

Once the evaluation phase is completed, a **validation committee**, composed of the EFJ president, vice-president and treasurerwill be established. This will be convened to approve the final list of proposed beneficiaries.

**Cascading grants will therefore be awarded to those organisations who:**

* **Fulfil the eligibility criteria**
* **Fulfil the organisational and financial capacity criteria**
* **Submit an application (“capacity building workplan” and corresponding budget and annexes) which meets the evaluation criteria**

The amount of the cascading grant will be determined by the budget estimate submitted (calculated according to the workplan foreseen). The co-financing principle will be used: cascading grants will cover up to maximum 95% of the total estimated cost of the national workplans submitted. The final figure (co-financing rate) is dependent upon volume of applications received.

**Cascading grant agreements: monitoring, evaluation, and reporting**

Once the final list of beneficiaries and awards are established, the successful grant beneficiaries will be invited to sign a cascading grant agreement which will set-out the terms and conditions of the financial support. A pre-financing instalment (40% of the grant) will be transferred to the beneficiaries upon signature of the cascading grant agreement. A second

pre-financing instalment (30% of the grant) will be transferred upon validation of a mid-

term progress report, and the payment of the balance will be done upon validation of the

final activity report and financial statement.

ETUC and EFJ will host a **kick-off event** gathering all national beneficiaries, whereby national workplans can be launched and final details can be finetuned so as to ensure the necessary reporting, monitoring and evaluation tools are in place.

Each national beneficiary will be able to contact the EFJ secretariat for inquiries related to the implementation of their project. The ETUC **permanent** **Helpdesk** will be accessible for the beneficiaries to enquire general questions throughout the duration of the project. A **periodic monitoring process** via regular bilateral “monitoring meetings” will be held (virtually) between the EFJ secretariat with beneficiaries at all stages of their workplan to ensure a smooth running of their operations and offer support.

Upon completion, **a final report dossier** must be submitted by national beneficiaries, providing a technical activity report, an evaluation of the capacity-building outcomes, and a financial statement of the costs actually incurred. The balance will be paid to beneficiaries once this final report has been received and approved by EFJ. A **final conference** and exchange event will be organised to take stock of key outcomes, promote an exchange of experiences among beneficiaries and showcase interesting practices.

**Timetable**

| **Month** | **Description of activity** |
| --- | --- |
| **29 September 2021** | * Publication of call for proposals by ETUC and EFJ and establishment of a Helpdesk to support national applicants * Establish steering and evaluation committee |
| **11 October 2021** | * EFJ information briefing to potential beneficiaries (Online) |
| **29 October 2021** | * Deadline for national beneficiaries to submit applications for their capacity-building workplans |
| **November 2021** | * Applications to be processed by steering and evaluation committee * Steering and evaluation committee to submit proposed list of beneficiaries to validation panel * Formal validation of list of beneficiaries |
| **December 2021** | * Sign off cascading grant agreements with national beneficiaries |
| **January 2022 – April 2023** | * Kick-off event with national beneficiaries * Implementation of 12-15 month national capacity-building workplans and monitoring of the outcomes * Helpdesk within ETUC to continue supporting national beneficiaries |
| **April-June 2023** | * General outcome evaluation by national beneficiaires, with final report dossier to be sent to ETUC * ETUC will compile information into a final activity and financial report (to be submitted to European Commission) * A final conference and overall dissemination of results expected to take place |

**Next steps for applicants**

EFJ invites established journalists’ unions and associations in EU Member States, UK, Iceland, Norway or in EU candidate countries (Albania, North Macedonia, Montenegro, Serbia and Turkey) to submit cascading grant application by completing the templates annexed to this call: description of capacity-building workplan (see Annex 1), budget form (see Annex 2), and profits and loss form (Annex 3).

**Applicants are not expected to produce an entirely new project, but rather design their workplan around their existing COVID-19 recovery plans at national level.** Eligible applicants are invited to submit their application to ETUC by **29 October 2021.** Applications must be sent to the following e-mail address: [secretariat@europeanjournalists.org](mailto:secretariat@europeanjournalists.org)

Applicants must use the templates provided. Please ensure that **all the documents listed in the checklist below** are attached to the application to be considered for funding:

☐Completed application form

☐Completed estimated budget (Annex 1)

☐Balance sheet for the last financial year (financial capacity)

☐Profit and loss account (Annex 2)

☐CV of the person in charge of the implementation

☐Declaration on honour by the legal representative (for applicants without legal personality) (Annex 3)

☐Statement of exclusion (Annex 4)

1. The applicant must follow its usual practice to prove the value for money (e.g. asking for three different quote from different suppliers) when subcontracting certain tasks in the project. It shall justify that the task cannot be performed by its own staff/human resources. [↑](#footnote-ref-0)