



**TERMS OF REFERENCE & INVITATION TO TENDER FOR:
Evaluation of EC Umbrella 2018-2022 grant and Mid-term review of Eurodad's 2021-2025 Strategic Plan**
Tender reference: 2022-19
Date of publication: 22/12/2022
Deadline for submission: 15/01/2022, 17:00 CET

Eurodad is a network of 58 NGOs across Europe, working on development finance advocacy. Our focus is on strengthening the power of European CSOs, working as part of a global movement to push governments and powerful institutions to adopt transformative changes to the global economic and financial system. More information can be found on our [website](#).

2022 is the last year of the EC Umbrella CSO-LA 2018-870 grant and therefore an external evaluation is required to assess the results of the project. At the same time, Eurodad is now half-way through its 2021-2025 Strategic Plan and therefore wishes to do a 'light' review to reflect on the progress against the strategic plan to date. Given the overlap between the objectives of the grant and strategic plan, Eurodad will combine the two processes. Therefore, Eurodad is seeking a consultant to support this exercise from February to May 2023 (exact number of days to be determined during the procurement and interviewing process).

Objectives of the contract

Eurodad is looking for a consultant to provide support with the following objectives:

- Designing the evaluation of the project and mid-term review of the strategy including development of detailed methodology and implementation plan/schedule
- Conducting the evaluation and mid-term review including desk reviews, interviews with selected stakeholders (internal and external, maximum 20) with support from focal points designated by Eurodad.
- Facilitating one or more workshops to answer the broader questions posed by the evaluation and mid-term review
- Producing a final report (and other relevant documents) with comprehensive analysis, conclusion and key recommendations.

Outputs for this contract

Consultant is expected to deliver the following outputs:

- A document outlining proposed methodology including a questionnaire to be used for the interviews or/and questions for focus group discussions
- A document outlining a clear and detailed plan for the implementation of the evaluation and mid-term review, including estimation of costs.
- A PowerPoint presentation with a summary of key findings of the evaluation and mid-term review
- A detailed final report outlining the process, methodology, key findings and recommendations
- A separate document outlining a summary of key recommendations in regards to the content of the Strategic Plan with particular emphasis on the Theory of Change and Objectives and changes that may be required.

Contract timeline

The contract has been tentatively scoped for a period of 25-30 days, with the following provisional schedule:

- February: orientation of the consultant, desk review, start interviews with the key stakeholders
- March: preparation and facilitation of one or more face-to-face (approx. 50 people)/hybrid workshops, complete interviews
- April: writing of the report, sharing a draft report with Eurodad and presenting initial key findings
- May: processing the feedback, finalizing the report and submitting to Eurodad by the end of May

A detailed and updated schedule will be developed with the support of the consultant to be recruited, including exact deadlines and division of labour between the consultant and Eurodad. The Eurodad Director, Management Team, wider Secretariat, Network Strengthening Group, and the Board will be consulted as needed throughout the process.

Duration of this consultancy (i.e. number of exact days needed) may be flexible and determined during the procurement and interviewing process, depending on the methodology and anticipated costs. The tentative total budget for this consultancy is EUR 14,000 and can be increased if needed.

Method of work

Consultants will use OECD DAC criteria for evaluation to assess the performance of the project. The consultant will develop and finalise key specific and complementary questions to feed into the combined mid-term review, with support from designated focal points at Eurodad

Practical arrangements

This consultancy is expected to take place remotely except one or more face to face workshops. Final details to be agreed during contract signing phase.

Background information

The essential information about the grant in question and Eurodad's Strategic Plan can be found in the documents listed under 'Annexes' section of this ToR. Consultants are requested to carefully review all documents before developing and submitting their proposals for this assignment.

Selection criteria

Eurodad selects suppliers/consultants to be awarded for a contract based on best value for money. For this tender, the following criteria will be considered:

- A minimum of 5 years of experience of conducting evaluations and reviews at an organisational level. Experience conducting evaluation of EC funded projects is a plus.
- A demonstrated understanding of development finance issues
- Demonstrated experience with supporting non-profit organisations working in the field of policy and advocacy with a diverse group of actors and stakeholders
- Excellent proficiency in English is required. Knowledge of Spanish is a plus.
- Evidence of capacity and reliability: based on Eurodad's past positive experience with bidder, references from other organisations or evidence of similar contracts in the past.
- Commitment to Eurodad's values: a demonstrated commitment to promotion of social and economic justice

Exclusion criteria¹

If any of the following are true for the bidder at the time of submitting their tender or at any time during the procurement process, they will be excluded from consideration for winning a contract with Eurodad. The bidder may also be blacklisted for participation in future Eurodad procurements. By submitting a tender, the bidder declares that they are not in one of the following situations:

- a) *They are bankrupt, subject to insolvency, or being wound up, are having their assets administered by a liquidator or by a court, have entered into an arrangement with creditors, have suspended business activities, or are in any such situation arising from a similar procedure provided for in national (or EU) legislation or regulations;*
- b) *They have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with applicable laws;*
- c) *It has been established by a court's final judgment or by a final administrative decision that the bidder is guilty of grave professional misconduct by having violated applicable laws or regulations or ethical standards of the profession to which the bidder belongs, or by having engaged in any wrongful conduct which has an impact on its professional credibility where such conduct denotes a wrongful intent or gross negligence. This includes:*
 - i. *misrepresenting the information required as part of this procurement procedure*
 - ii. *entering into agreement with other persons with the aim of distorting competition*
 - iii. *violating intellectual property rights*
 - iv. *attempting to influence the decision-making process during this procurement procedure*
 - v. *attempting to get confidential information that might give an unfair advantage in the procurement procedure*
- d) *It has been established by a court's final judgment that the bidder is guilty of any of the following:*
 - i. *fraud*
 - ii. *corruption*
 - iii. *relations with a criminal organisation*
 - iv. *money laundering or terrorist financing*
 - v. *terrorist offences or offences linked to terrorist activities, or inciting, aiding, abetting or attempting to commit such offences*
 - vi. *child labour or other offences related to trafficking of human beings*
- e) *In the past, the bidder has shown significant failures in complying with the main obligations of a procurement contract with the client or financed by the European Union, which led to early termination or other contractual penalties, or which was discovered during checks or audits.*
- f) *It has been established by a court's final judgment or by a final administrative decision that the bidder has committed an irregularity.²*
- g) *It has been established by a court's final judgment or by a final administrative decision that the bidder has created an entity under a different jurisdiction with the intent to circumvent fiscal, social or any other legal obligations in the jurisdiction of its registered office, central administration or principal place of business.*

¹ These exclusion criteria are in compliance with the 1 Aug 2020 PRAG (the Practical Guide on contract procedures for European Union external action), Section 2.6.10.1.

² The European Union defines 'irregularity' as "any infringement of a provision of Community law resulting from an act or omission by an economic operator, which has, or would have, the effect of prejudicing the general budget of the Communities or budgets managed by them, either by reducing or losing revenue accruing from own resources collected directly on behalf of the Communities, or by an unjustified item of expenditure." (Article 1(2) of Council Regulation (EC, Euratom) No 2988/95)

h) It has been established by a court's final judgment or final administrative decision that the bidder has been created with the intent described in point (g)

If Eurodad has any reason to be concerned that the bidder may be in one of these situations, Eurodad may request appropriate evidence. Additionally, if the bidder is selected for a contract, Eurodad will confirm that the contractor is not included in the list of EU restrictive measures (sanctions list)³.

How will Eurodad decide who wins the contract?

Eurodad has a Tender Committee made up of at least four members who will open and evaluate all tenders received. We will first check that all tenders are complete and submitted on time. Incomplete or late tenders will be rejected. We will then evaluate the tenders against the Selection Criteria listed above and select the supplier which offers the lowest price and best matches all the other Selection Criteria. Any supplier who matches one of the Exclusion Criteria will be rejected.

Anti-fraud policy

Eurodad has a zero-tolerance approach towards corruption and fraud in all its forms. Eurodad aims to prevent fraudulent activities and to respond to any allegations or potential fraud swiftly and effectively. If the bidder or any member of staff is aware of any corrupt or fraudulent activities in relation to this procurement process, they are requested to report it to Eurodad's Director (jsaldanha@eurodad.org) immediately.

Privacy policy

If you decide to submit a tender to this call, please note that Eurodad will keep your information and offer for at least 10 years as it is legally required as supporting documentation for our donors even if you are not selected for the contract. For more information about our privacy practices please visit [Eurodad's website](#).

Payment

Bidders should be aware that if they are selected for this contract, payment will be made on the following terms: 30% after the delivery of a draft report and remaining 70% after the completion of the consultancy and delivery of all agreed outputs. Please note that the contract will include agreed completion dates and penalties may be applied for late completion.

Specific requirements for tenders

Prices should be given in EUR, exclusive of VAT

Instructions for submitting tenders

Deadline: Tenders must be submitted no later than **15/01/2023, 17:00 CET**. Tenders submitted after this time will not be considered.

³ In compliance with 1 Aug 2020 PRAG, Section 2.4



Where and how to submit tenders: Tenders should be submitted via email to syuldasheva@eurodad.org with the subject "Tender" and the tender reference: **2022-19**

Language of tenders: The tenders and supporting documents must be in English.

The submitted tender package must include:

- Detailed offer outlining the approach for conducting the evaluation and mid-term review including information on the methodology, implementation plan/schedule, costs (clearly showing the calculation of the total amount based on no. of work days and daily rates).
- CVs or equivalent of the consultant responsible for this contract
- Proof of past successful services with contact details of people we can contact for references if necessary
- The signed declaration on honour at the end of this document confirming that the bidder does not match any of the exclusion criteria
- Companies must provide a copy of their company's registration document, as proof of their nationality in compliance with the European Union's Rules of Nationality. (Freelance consultants are exempt from this requirement).

Tenders which are incomplete or not submitted as described above will be excluded.

Contact Person

If you have questions about the terms of reference or invitation to tender requirements, please send these in writing to Jeronimo Ruiz Victoria at jvictoria@eurodad.org. Please do **not** send tenders to this address. It is forbidden to discuss price with this contact person and this person will not be involved in the decision-making for this contract.

Annexes

- Strategic Plan 2021-25
- 2021-25 Strategy Implementation Plan
- Annual Report 2021
- EC Umbrella CSO-LA 2018-870 project proposal and logframe

Bidder information

Name of bidder	
Legal status of bidder	
Nationality/country of registration	
Legal registration number of bidder (or ID or passport number, if an individual)	
VAT registration number	
Full legal address of bidder	



Does the representative or any member of the company have any personal or business relationship with Eurodad staff, its members, partners or its donors? Please declare any known relationships.

(Eurodad will then determine if there is a conflict of interest for the supplier to participate in this procurement, or take extra measures to avoid a conflict of interest. Failure to disclose any known relationships may result in exclusion from participation in this or future procurements if such relationships are later discovered.)

Declaration on honour

By signing this document, the bidder certifies that that they have read and understood this Invitation to Tender and that they are not in one of the situations listed above under *Exclusion criteria*. The bidder also certifies that all the information provided about the company under *Bidder information*, and any documents submitted with the tender are truthful and correct at time of signature.

Name of legal representative

Location

Signature

Date



European network on
debt and development

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Eurodad Strategic Plan 2021-25

I) Introduction

Foreword

If Agenda 2030 and the Paris Agreement are to stay the collective vision we strive towards, the global community needs to act resolutely to rebalance power and redistribute resources through policy change and individual behavioural change. This has become even more critical in a world hit by the Covid-19 pandemic, which has complicated and intensified existing crises and inequalities within and between societies.

It is not that the global community lacks the means to finance a just and ecologically sustainable recovery. However, the world has to reckon with years of austerity, liberalisation and privatisation, combined with a race to the bottom in tax and transparency policy and ongoing deficiencies in global economic governance. Financing sustainable development requires adequate levels of public finance invested in high quality and accessible public services and social protection. This in turn requires tax justice, rights-based debt governance and democratic, accountable and gender-balanced institutions at all levels. It will be political and social inaction and apathy on one end of the spectrum and a sense of frustration and powerlessness on the other that will pose the biggest obstacles. Tackling them will determine whether 'building forward better', the catchphrase for post-Covid-19 recovery, is just an empty slogan or truly the starting point to turn the tide of injustice. It is a challenge that the Eurodad network, together with our partners and allies, have demonstrated we can rise up to. 2020 saw the resurgence of the global debt movement, together with many more collaborations being strengthened or created, often with actors who have never previously engaged on development finance issues. The impact of this collective action is already visible and we will work to keep it strong and effective through this strategy.

Summary of the process

Our new strategy builds on the impact and learning from our 2015-19 strategy. An evaluation of the strategy conducted in 2019 pointed out some of the network's important achievements during the course of its five years. Visible progress was made in all Eurodad's tax justice goals. Eurodad succeeded in its efforts to strengthen the European debt movement and put the topic back on international organisations' agenda. Pressure to address tied aid and democratic ownership of development finance increased. Eurodad's accurate analysis of the extent to which publicly-backed private finance would dominate the development finance agenda positioned us strategically to challenge this approach and put forward alternatives. Equally, the evaluation pointed to the challenges the network faced in trying to grow in issues and membership with a limited budget as well internal challenges about realistic goal setting. We have therefore paid particular attention to our objective setting, ensuring they are ambitious yet monitorable.



The strategic planning process began with a large gathering of Eurodad's members and partners from all over the world in December 2019. The strategy was all set to be ready by June 2020. However, with the outbreak of the Covid-19 pandemic came the realisation that we needed to carefully consider how the crises that came in its wake would impact on our work. This resulted in numerous virtual discussions, strategy sessions, webinars and informal dialogues with a wide range of people engaging with Eurodad. They have been a valuable source of information and inspiration as we finalised the strategy, ensuring that our work in the next five years sets us on course to achieve our vision of a more equal world in which finance is at the service of human rights and environmental integrity.

II) Theory of Change

A. The external context

Alongside the considerable changes over the last five years, the COVID-19 pandemic has dramatically altered the environment that we live and work in. Below we identify some key elements that will have an impact on the global movement to achieve economic justice.

Political factors: The global community's failure to adequately support countries in the global south hit by the Covid-19 pandemic has turned the SDG slogan 'leave no one behind' into a hollow mantra. Even before the onset of the crisis, hyper-globalisation as the root cause of increasing impoverishment and inequality was already criticised and is now also the target of the political right and nationalists. Against this backdrop popular discontent with economic injustice has been harnessed in support of policy agendas that are intensifying division and marginalisation. Public discourse has been effectively reoriented in many countries, questioning civil society's legitimacy, undermining social movements, democratic processes, and the role of the state itself. This is triggering a reflection among civil society about the way we communicate about our role and value in society. As it approaches its 80th birthday in these turbulent times, the UN is faced with an existential choice between fading into irrelevance due to corporate capture¹, or rising to the occasion, to preside over a new consensus for the reform of global governance. This would have to cover the Bretton Woods Institutions (BWIs). Their remarkably progressive rhetoric in response to the pandemic has been betrayed by their continued inability to depart from the economic orthodoxy that has been proven wrong time and again. It will also require global tax governance reform, ending the dominance of the unrepresentative and ineffective OECD.

Economic factors: The global financial crisis of 2008 has demonstrated how one crisis can unleash another. Austerity has become a 'new normal'² for over a decade, with a majority of countries in the world reducing public expenditure since 2010, including cuts in health budgets. In a vicious circle that aggravated the impacts of the COVID-19 pandemic, countries with less than 2.28 health workers per 1000

¹ Seitz Karolin, Fatal Attraction? Business Engagement with the 2030 Agenda, Misereor, Bread for the World, Global Policy Forum, February 2019.

² Ortiz, Cummins. Austerity: The New Normal. A Renewed Washington Consensus 2010-24. October 2019



inhabitants also demonstrated some level of debt distress, with debt in so-called 'Low-income economies' (LIEs) increasing from an average 40% GDP to 49% in 2019.³ Much of this debt reflects the nexus between the long-established Washington Consensus of austerity and privatisation with the newly-emerged Wall Street Consensus epitomised by the 'Maximising Financing for Development' agenda of the World Bank (2017).⁴ Initiatives to suspend debt servicing and emergency financing on offer are little more than temporary respite to those who are eligible and willing to accept them. Combined with the changing composition of ODA,⁵ the failure of the multilateral trade system to serve the ends of sustainable development further aggravated by opaquely negotiated bilateral and mega trade and investment deals, countries in the global south are now exposed to complex and expensive financing instruments. Alongside this, threats of being sued by foreign investors and vulture funds hang over their heads like the sword of Damocles.

Social factors: The Covid-19 crisis starkly highlighted inequalities that deepened as a result of the 2008 financial crisis. Those at the bottom of the ladder have been hit the hardest: the homeless, migrant workers and displaced people living in crowded and inhumane camps, those with no access to water-taps and soap, informal and manual workers without the option to work from home. Across the world the poorest have been hit the hardest by the unevenness of healthcare coverage. Structural racism and discrimination on the grounds of race and ethnicity made access to healthcare of minority groups, people of colour, women and gender minorities during the pandemic even more challenging. At the same time, the pandemic has illustrated more clearly than ever before the fundamental value and necessity of the care economy in which women are disproportionately represented. Women have borne a much higher share of responsibility for childcare and care for the elderly, responsibilities which become acute during closure of schools and external care facilities during the pandemic. Additionally, given the gendered nature of the economy, women, often in poorly paid jobs, were a large proportion of the 'essential workers' or the informal sector which continued to service society during the lockdown.

Technological factors: The COVID-19 crisis put the need for affordable and accessible technology and specifically information technology even more in the spotlight. Unequal access to technology within and between countries risks creating islands of technology 'haves' and 'have-nots.' This underlines the urgency of the agenda to ensure fair and effective means of technology transfer as well as adequate regulation of technology-monopolies. At the same time the climate and environmental impacts of technology are becoming increasingly clear. A blind faith that technology will equip the world to deal with the climate crisis risks undermining climate justice. On top of this, from virtual currency to electric cars, technological innovation that is supposed to solve today's crises are only increasing the demand for energy and resources. Socially, the fourth industrial revolution - the deepened and increasingly systemic

³ Munevar, D. Covid-19 and debt in the global south: Protecting the most vulnerable in times of crisis. March 2020.

⁴ Gabor, D. "The Wall Street Consensus," SocArXiv wab8m, Center for Open Science. July 2020

⁵ Craviotto, N. "[What the new data on private instruments do not tell us.](#)" Eurodad March 2020



role of technology in society - is undermining hard-won labour rights and social protection. Combined with youth unemployment and job losses, the phenomenon of micro-jobs in the technology sector, on top of the outsourcing of such jobs to jurisdictions with little or no social protection nor freedom of association, will widen inequality and increase the vulnerability of a growing group of workers. From a political perspective, information technology's role in manipulating information and spreading false news has had widespread political and social repercussions, with policy-makers still grappling to find adequate regulatory instruments to deal with this.

Legal factors: The rule of law is a key enabling factor for the full realisation of human rights and the creation of more equal societies. Yet, the level of access to it and enjoyment of its protection is not equal within society and across countries. Underinvestment in the public sector has also undermined the ability of state institutions to operate efficiently. Additionally, governments have systematically undermined international law through contrary policies and practices, as well as by inadequately funding UN treaty bodies tasked with monitoring states' respect for their human rights obligations. These impediments reinforce distrust in the legal system and play into the hands of forces seeking to question the efficacy of public institutions. Countries in the global south are hampered in their ability to influence hard or soft law creation at the global level either because they are not proportionally represented, as in the case of the Bretton Woods Institutions, or because they do not even have access to decision-making, as in the case of the OECD. Furthermore, even when they have some space to participate in processes that have an impact on legal frameworks, they lack the capacity to negotiate on equal terms. At the national level, this lack of capacity also influences the level-playing field for negotiation with donors, transnational companies and other actors (such as the IMF and World Bank) pushing for the reform or creation of legal frameworks to ensure an “enabling environment” for foreign direct investment.

Environmental factors: Pollution and the industrial scale of extraction of natural resources has reached levels that exceed the capacity of nature to restore itself. Climate change further undermines ecosystems that are already under great distress. With natural resources like forests, clean water, atmospheric absorption capacity and arable land becoming scarcer, they will also become an increasingly lucrative financial asset, as a commodity to be traded for profit. Social movements are increasingly warning of the impact of the “commodification of nature” leading to its financialisation. Communities that rely on forests, the sea or the land for their livelihoods are the first victims of this drive towards commodification of nature and its financialisation. Additionally, this trend will dramatically increase inequality as the competition for natural resources intensifies.

B. Our vision: Long term objectives

We want to see a world in which wealth and power is equitably distributed, which is fairly, democratically, accountably and transparently governed from the local to the global level; and in which publicly regulated finance enhances systems of redistribution to ensure economic justice is at the service of the universal realisation of human rights and environmental integrity.



C. How we believe change happens

Civil society at all levels and in all its diversity has a central role to play in creating change. In order to do so, civil society must be well-informed, well-resourced and well-organised, ideally working in like-minded and broad coalitions. The objective is to seize all available opportunities to create and inform public debate at the local, national, regional and global level, in order to sustain and increase calls for change from different actors in society. The underlying assumption is that this will lead to fair and transparent processes being put in place for the design, adoption and effective implementation of public policies that will promote sustainable development and climate justice.

D. Eurodad's role in creating change

Our purpose: Eurodad works for transformative yet specific changes to global and European policies, institutions, rules and structures to ensure a gender just, democratically controlled, environmentally sustainable financial and economic system to eradicate poverty, reduce inequalities and ensure human rights for all.

We aim to achieve this by:

- 1. Having results-focussed strategies to deliver specific, transformative policy changes:** We aim to have sophisticated, flexible and clear political strategies. This includes getting the policy change demands right - ensuring that they are transformative yet detailed and specific. On the one hand our political demands are anchored to ambitious but well-defined medium-term objectives. On the other they are truly transformative, meaning it will: take us closer to our long-term objectives; shift the power balance; and open up new ground for further change towards our purpose and vision.
- 2. Building and supporting powerful coalitions for change:** Eurodad's focus is on strengthening the power of a network of European civil society organisations (CSOs), working as part of global civil society. This includes complementing the work of our members and allies at national and local level through strategic coordination, capacity-building and joint actions at the regional and global level, together with our sister-debt and development organisations in other parts of the world and other peers.

Eurodad is confident that we can contribute to the change we seek thanks to:

- Our deep and detailed understanding and sustained pursuit of the issues we work on.
- Our respected position with other allies and civil society networks, and our work with global and regional coalitions, in particular:
 - Our ability to develop joint strategies within our membership network.
 - Our strong cooperation with allies all over the world, and particularly from the global south.
- Our good connections to policy-makers and other influencers.



- Our ability to develop results-focussed strategies, and track progress to our goals.

III) How we will work

Eurodad seeks to achieve change collectively. To ensure that we are an inclusive network, the secretariat aims to be innovative, flexible and collaborative, bringing together all CSOs working on finance for development, strengthening our network and the wider economic justice movement through capacity building and sharing knowledge. We do not prescribe certain ways of working, but rather agree these annually with the membership, based on what is the most effective approach for achieving change on each issue we work on. Members are free to choose at which level they wish to engage, and to engage in different ways on different issues.

Eurodad aims to be as representative as possible in terms of geographical coverage across Europe. We also make efforts to ensure many different kinds of CSOs, from international organisations to small specialist, expertise-based organisations, can effectively engage in our work.

Seeking to influence policy change based on sound research, policy analysis and strategy, Eurodad aims to continue to attract and retain experts in the areas worked on.

IV) Strategic objectives

The strategic objectives relate to priorities that have been identified by the network and allies as essential to achieving our long-term objectives and areas in which we have a clear contribution to make based on our experience and the roles that we play. Each priority sets out what our five-year objectives are, how we aim to achieve them and the underlying theory of change.

Our objectives are 'CREAM':

- **Clear:** The objectives clearly set out what we want to achieve.
- **Relevant:** The objectives are relevant to Eurodad's vision, the external context and our reality as a network.
- **Economic:** The objectives are achievable with the resources (financial and human: our skills, expertise, experience, roles and relationships) that we have available to us.
- **Adequate:** The objectives are ambitious but realistic to achieve the change we seek.
- **Monitorable:** The objectives can be monitored, adjusted and independently evaluated.

- **Tax Justice**

Progressive taxation, whereby those with higher incomes or more wealth pay a higher rate of tax than those with less, is an essential tool to fight inequalities and mobilise sustainable sources of financing for development and environmental protection, including for the achievement of the 2030 agenda. However, illicit financial flows, including international tax avoidance and evasion, continue to drain resources away from public services and development. When the richest corporations and individuals hide their resources



in tax havens, the possibilities for progressive taxation are undermined. This can lead to increasing debt levels, or use of regressive taxes that exacerbate inequalities, including gender inequality (not least since women are overrepresented among the poorest). Lack of tax income can also lead to underfunded public services, which tends to impact harder on women and gender minorities than on men.

In recent years, we have seen a growing recognition of the short-comings of the current international tax system. At the same time, important alternatives such as unitary taxation and a global minimum effective corporate tax rate have been gaining more traction among governments.

However, we have still not reached the point of real fundamental and transformative changes to the international system. Furthermore, ongoing reform efforts continue to focus on the interests of the world's largest economies and corporations, while marginalising the interests and realities of the poorest countries and people. A key reason for this is that international decision-making takes place in opaque decision-making bodies where government accountability is low, and developing countries are not able to participate on an equal footing. The United Nations remains the only body where all countries can negotiate as equals, and has a central role to play in the transformation of the global tax system.

As the world's largest economy, the European Union (EU) also has a key role to play. In recent years, the EU has taken important steps forwards, including in the fight against anonymous shell companies. However, there is still a need to increase the level of ambition, including to prevent EU Member States from facilitating corporate tax avoidance. During the next five years, we will aim to ensure that the EU introduces public country by country reporting for all sectors and starts to abolish all harmful tax practices within the EU Member States.

Achieving lasting change will require a strong and effective tax justice movement. Eurodad will continue to play a key role in the coordination at regional and global level. And with the active engagement from national members all over Europe, the close cooperation with our partners and allies in the global south, as well as strong expertise and a network in Brussels, Eurodad is set to play a key role in turning the political potential into further victories.

Five-year objectives

- i) Specific proposals from CSOs and champion governments, as well as the establishment of an intergovernmental UN tax commission where all countries participate on an equal footing. This will prepare the ground for a transformation of the global tax standards towards an international system that is effective, progressive, development oriented, environmentally responsible, transparent and gender just;
- ii) The EU introduces binding regulation that significantly reduces international tax evasion and avoidance, including public country by country reporting for all sectors and legislation going beyond the OECD inclusive framework to be adopted in 2021;



iii) Tax justice campaigns and political pressure in individual countries around the world are reinforced by a well-functioning, effective, transparent and democratic global tax justice movement.

- **Debt Justice**

Public and private debt had been growing at unprecedented speed and levels all over the world and particularly in the global south. Countries' economic and financial resilience is undermined by underinvestment in public services due to rising public debt service payments. This situation threatens the fulfilment of economic, social and cultural rights. Women's rights and gender justice are particularly at risk. This grave situation has been exacerbated by the economic crisis triggered by the Covid-19 pandemic. Economic crises reduce government revenue and make it harder for governments to service their debt. The climate crisis places additional strains on fiscal sustainability. Despite their entitlement to adequate climate finance, vulnerable countries are forced to cover, mainly with further indebtedness, adaptation costs, loss and damage from climate related events, and rising borrowing costs. Despite recent initiatives to provide temporary suspension of debt payments for a limited number of the world's poorest countries, there is a growing consensus that a protracted debt crisis in the global south is very likely. As in previous debt crises, implementation of austerity measures will hit the most vulnerable the hardest. Women and children and young people suffer disproportionately due to cuts in public expenditure, including in public education, during a debt crisis that usually lead to reduced provision of public services and social benefits.

The systemic weaknesses of international sovereign debt architecture have been laid bare by the Covid-19 pandemic. These include widespread debt overhangs, substantial increases in debt vulnerabilities and complex processes of debt relief and restructuring that fail to promote efficient and equitable outcomes. Furthermore, a structural power imbalance favours the interests of official, multilateral and private creditors to the detriment of the protection of sustainable development and human rights in developing countries. In coordination with a global network of CSOs, Eurodad aims to place the establishment of a multilateral Debt Workout Mechanism (DWM) under UN auspices at the centre of the UN 2030 Agenda Financing for Development forum and of national and international Covid-19 recovery efforts to end the immense human and economic costs of debt crises.

At the same time, the complex interaction of international agreements, overlapping legal jurisdictions and national policies that composes the international sovereign debt architecture is in constant flux. This makes it a contested field open to influence and action by CSOs to achieve immediate improvements for the benefit of developing countries. In this context, Eurodad, working with CSOs, will place pressure on governments and IFIs to develop a new approach to debt sustainability, relief and restructuring processes. We will research and advocate for approaches consistent with the achievement of the 2030 Agenda, with an emphasis on the protection of human rights, the environment and gender equality.



In order to tackle these challenges a dynamic and coordinated civil society network working on debt justice is essential. The network must have the capacity to engage in and influence policy debates. We need to maintain coherent and sustained pressure for transformative global policy solutions in borrowing and lending countries, International Financial Institutions, United Nations and other decision-making international forums. Participation of CSOs from both the global south and global north and deepening the links with CSOs in sectors beyond the debt movement, particularly women's rights and environmental CSOs, is vital. We will work, together with our regional partners, to promote a knowledgeable, rejuvenated and durable debt movement, through strengthening and dynamising coordination, strategising and information sharing spaces, as well as through active campaign and advocacy work with partners, strategically targeting both borrowers and lenders.

Five-year objectives

- i. Foster governments to establish a Multilateral Debt Workout Mechanism under UN auspices to ensure a systematic and timely approach to orderly, fair, transparent, and durable sovereign debt crisis resolution.
- ii. Contribute to and accelerate the progressive reform of approaches to debt sustainability and processes of debt relief and restructuring to support the achievement of the 2030 Agenda, with an emphasis on the protection of human rights, the environment and gender equality.
- iii. A knowledgeable, rejuvenated, dynamic and durable global coalition of CSOs working on the debt justice crisis acts in a coordinated and strategic manner towards urgent and long-term reforms of the international sovereign debt architecture.

● Development finance

Over the past decade, multilateral and bilateral development finance institutions – still largely dominated by countries in the global north – have increasingly shaped the development finance architecture, while financing instruments crafted to leverage private finance, such as blended finance and public-private partnerships (PPPs), have proliferated. In the wake of the accelerating climate crisis, climate finance providers are not only attempting to count development finance towards fulfilling their commitments under the Paris Climate Agreement but are also seeking to learn from the experiences in development finance, including leveraging private finance. The effectiveness of these institutions and instruments, however, is judged by their ability to mobilise additional private investment rather than their effectiveness to deliver on social, economic and climate justice objectives. As a consequence of the pandemic, fiscal and policy space of developing countries to guarantee human rights, provide access to high-quality public services and build climate-proof economies is extremely constrained, while on the other hand donor countries are prioritising their own domestic challenges and hoping that the private sector will close the financing gap to achieve the SDGs.



The coming years will be key to ensure development and climate finance maximises its transformational potential to eradicate poverty, fight inequalities, build climate-friendly economies and ensure human rights, including access to high quality public services for all. In order to realise this vision, urgent CSO action is needed in four interrelated areas of the development finance landscape:

- i) The narrative promoted by policy makers needs to recognise the unique role of public finance and limitations of market-based approaches that currently direct development finance resources, policies and strategies, without empirical evidence that this advances agreed development and climate goals.
- ii) Financial resources provided by donors need to be adequate, respect the highest quality standards and be aligned with democratically determined development and climate priorities. Policy discussions on how to finance the SDGs and a fair and just transition to a green economy provide the opportunity to restore ODA to what it should be: unique, concessional and additional.
- iii) The international financial architecture includes the interplay of the relevant financial institutions at national, regional and global levels and the normative frameworks, strategies and policies they promote. This architecture needs to work to broaden the fiscal and policy space of developing countries to tackle development needs. All too often, austerity policies have been pursued in many countries, often following interventions of the Bretton Woods Institutions, which have negatively impacted these countries' ability to deliver on public services and human rights. A key focus is on reclaiming public banking in the public interest and promoting an equitable model that is at the service of citizens. If well governed and better resourced, public development banks at different levels - national, regional and global - can contribute to ensure that projects are sustainable and guarantee human rights.
- iv) The right financing modalities and instruments need to be prioritised. The current aid paradigm prioritises market-based solutions to development, social and climate challenges, which translates into an increased use of particular modalities and instruments, such as PPPs, blended finance and guarantees - that are less concessional, entail contingent liabilities for public actors, reduce debt sustainability and risk undermining human rights and quality public services. A key challenge is to make sure key institutions deploy the right modalities and instruments to ensure human rights and access to high quality infrastructure and public services for all.

In recent years Eurodad and partners have played a critical role in challenging the prevailing development finance paradigm. However, calls for alternative approaches are still relatively weak and fragmented. These voices need to be strengthened as experience shows that market forces are insufficient to respond to the current financing needs. While the private sector can play a critical role in addressing development and climate challenges, public finance and states' capacity to regulate in the public interest are critical to foster inclusive and sustainable development. Changing the current paradigm will require a strong focus



on the policies and practices of those actors that are at the forefront of this debate, including key donor governments, the OECD-DAC and multilateral and bilateral development finance institutions. Additionally, this needs active engagement in fora that are more accommodating to critical perspectives on economic policies, such as the UN. Despite several criticisms and indications of 'corporate capture', the UN is a place where all countries are represented and where a more progressive narrative can get traction. It also requires a strong alliance of like-minded forces, from both the global north and south, that expose the negative impacts of market-based approaches and 'one-size fits all' policy prescriptions and call for human rights-centred alternatives.

Furthermore, the global climate crisis is accelerating rapidly, with deepening and irreversible impacts on people, nature and ecosystems. As the impacts of climate change become more apparent, different social movements – youth and student movements, trade unions, indigenous people movements, feminist and women's rights movements, etc. – connect their struggles and demand urgent and drastic action by policymakers. As multilateral banks and governments move toward 'greening' their finance operations and practices, CSO campaigns and advocacy are needed to steer this effort to ensure that climate finance is prioritised alongside sustainable finance, is new and additional to existing development finance, is impactful and effective and becomes more accessible to those who are directly affected by climate change. Moreover, as the lines between what constitutes development and climate finance are blurring, transformations in the development finance debate also apply to a large extent to the climate finance realm. In our work on development finance we will support ongoing campaigns to ensure providers of climate finance match their commitments in terms of mobilisation and allocation with actual needs and deliver climate finance in a way that supports developing countries' strategies to achieve the Paris Agreement and the Sustainable Development Goals.

In the coming strategy period, Eurodad will continue analysing the main trends in development finance and its nexus with climate finance, with a focus on shedding light on the impacts on the most vulnerable, including women and gender minorities. Eurodad will also work to ensure that providers of development and climate finance respect developing countries' policy and fiscal space to address development needs and the climate crisis, in an equitable and fair transition without imposing harmful economic policy conditions. Together with allies and partners, both inside and outside civil society, we will develop, amplify and advocate for concrete proposals for change that maximise the transformational potential of effective and high-quality development and climate finance. We will work on driving incremental changes that advance progressive proposals and ensure that the immediate harmful effects of market-based approaches to development and climate finance are mitigated. Eurodad will continue to play a central role in coordinating and strengthening relevant CSO movements.

Five-year objectives

- i. By 2025, a broad, diversified and well-organised coalition of CSOs and other like-minded actors challenges the current narrative on development finance and promotes one that calls for adequate

public finance, that delivers on human rights and provides access to high-quality and sustainable infrastructure and public services for all.

- ii. By 2025, providers of international public finance progress on all their commitments to deliver adequate finance and ensure its quality.
- iii. By 2025, a strong coalition of like-minded actors and institutions promote an international financial architecture for sustainable development that supports domestic policy and creates the fiscal space to deliver Sustainable Development Goals (SDG), help tackle climate crisis, and enable a sustainable recovery from COVID-19.
- iv. By 2025, donors and institutions take steps to prioritise financing modalities and instruments that are fiscally sustainable, responsible, accountable, transparent, gender-responsive, and ensure human rights, including access to high-quality public services for all.

V) Cross-cutting priorities

Eurodad has identified four cross-cutting priorities: gender justice and women and gender minorities' rights, financial sector regulation, global economic governance and climate justice that will be addressed in all our work to achieve our long-term objectives. Achieving climate and gender justice and women's and gender minorities' rights will relate both to our political and advocacy work as well as our internal organisational policies and practices. Financial sector regulation as a new issue will be progressively integrated into our work. On the other hand, global economic governance, a longstanding focus of Eurodad, will build on our existing work.

1. Gender Justice and Women's and Gender Minorities' rights

Take measures to change the disadvantageous position of women and gender minorities compared to men. These include adequate levels of public funding for universal gender-sensitive quality public services; ending policies and practices that promote austerity, deregulate the financial sector and promote a predatory private sector that further undermines the position of women and gender minorities in our societies and their discrimination and uneven access to employment, social protection and decision-making.

Eurodad's understanding of Gender Justice and Women's and Gender Minorities' rights

Along with gender, different [factors](#) such as ethnicity, social, economic and cultural background intervene in determining a person's place in society and the layers of discrimination faced. **Intersectionality**⁶ is a political perspective and analytical tool to

⁶ AWID. [Intersectionality: A Tool for Intersectionality: A Tool for Gender and Economic Justice](#). August 2004

understand and respond to the ways in which gender intersects with other identities and axes of discrimination, and how these intersections contribute to unique experiences of oppression and privilege. It is based on the analysis that neoliberal globalisation is embedded in colonial histories and is exacerbated by modern patriarchy and other contemporary forms of discrimination, thus perpetuating racism and gender inequality".⁷

Gender justice⁸ entails ending the inequalities between women, gender minorities and men that are produced and reproduced in the family, the community, the market and the state. It also requires that mainstream institutions — from the judiciary to economic policymaking — are accountable for tackling and redressing the injustice and discrimination that keep women poor and excluded.

Women's and Gender Minorities' Rights are the rights guaranteed to women and gender minorities under international human rights instruments and law, as well as through internationally ratified agreements such as the Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW). Women's and gender minorities' rights would also include the guarantees provided within national constitutional frameworks and laws such as equality under law, equal civil and political rights, including the right to a life free of violence, economic rights such as inheritance rights and equal wages for equal work, and social rights such as equal rights to education and health care

Feminism entails consciously, systematically and actively challenging and contributing to end sexism, bias and other forms of power or prejudice that underpin gender inequalities and discrimination against women and gender minorities.

By the end of this strategy we aim to:

- Ensure that all Eurodad policies and practices are feminist in their analysis and approach.
- Build a strong basis of work to achieve our gender justice and women's and gender minorities' rights objectives.

2. Financial Sector Regulation

Work to reverse the negative impact of market-based finance in developing countries. The main focus will be to seek and influence discussions on financial sector regulation in capital-source and recipient

⁷ Ibid. 5, pg. 1.

⁸ Building from UNIFEM. [Gender Justice and the Millennium Development Goals](#). 2010



countries. This work will be undertaken in tandem with Eurodad's current work and priorities. The ultimate objective is to ensure that the financial sector plays a supportive role in the accomplishment of national and multilateral development goals.

By the end of the strategy we aim to:

- Influence policy recommendations by multilateral bodies to curb the promotion of market-based finance in countries in the global south and strengthen support for measures to promote financial stability and expand domestic policy space for development.

3. Global Economic Governance

Advocate the creation of transparent and accountable global institutions, in which all developing countries are able to participate on an equal footing, and which promote progressive reform at all levels and contribute to gender equality, through their internal structures and policies as well as through their external impact.

By the end of this strategy we aim to

- See an increase in the number of countries supporting the establishment of an inclusive, transparent and well-resourced intergovernmental tax commission under the auspices of the United Nations;
- Systematise positive debt resolution innovations at the global level, shift IFI policy and embed more responsible financing practices, thereby deriving incremental progress towards a multilateral workout mechanism.
- Secure leadership and governance reforms of the International Financial Institutions, in particular the World Bank and IMF, to reverse their negative impacts on countries' ability to deliver on public services and human rights.
- Engage the UN, as the global governance body where all countries are equally represented, to counter the current development finance paradigm and promote critical perspectives on economic policies.

4. Climate Justice

Ensure the provision of finance to mitigate and adapt to climate change goes further than it currently does, is concessional and also includes provision for loss and damage. Climate finance must serve adaptation needs of countries in the global south and not just cater to the global north's focus on mitigation. There's an urgent need to ensure that countries who are most impacted by climate change, while bearing least responsibility for its causes, have adequate resources and the policy and fiscal space to implement a fair and just transition to zero-net economies supporting public services, while strengthening their resilience, fulfilling their human rights obligations, reducing inequalities and achieving sustainable development.



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By the end of this strategy we aim to

- Ensure that global/regional governance of tax and debt are structured in a manner to support countries' efforts to tackle the climate crisis, taking into consideration their imperative to manage climate risks, vulnerabilities and impacts.
- Ensure that the EU and International Economic Institutions support countries to forge their own long-term climate and finance strategies for a fair and just transition to zero-net economies and sustainable development.
- Ensure accessible, new and additional, concessional finance for climate impacted and vulnerable communities and regions.

Eurodad Strategy 2021-25 Implementation Plan

I. Introduction

The Strategy Implementation Plan describes the practical work programme that the Eurodad secretariat will lead in order to help the network respond to the demands of the newly approved Strategy. It is designed around a series of targeted initiatives, designed to deliver on the overall objective of strengthening the capacity of the Eurodad network to undertake coordinated actions and advocate for policy changes together with our partners and allies that support our mission of a democratically controlled, environmentally sustainable financial and economic system that works to eradicate poverty and ensure human rights for all.

Overall guiding principles for implementing the strategy

Eurodad will continue to use a three-pronged approach to implement the strategy:

- **Conducting research and analysis:** We will produce and communicate robust, respected research and analysis. We will monitor and assess the policies and agreements of multilateral organisations, the EU and European governments and their implementation to determine the extent to which they contribute or negatively impact the change we seek. We will also provide tools to strengthen the ability of members and allies to conduct research and analysis.
- **Being policy ‘entrepreneurs:’** We will seek to achieve our transformative policy change demands by speaking to experts, policy-makers and allies; by raising awareness among the general public by publishing articles in the media and supporting members/allies to do ‘popular-awareness’ actions ; by seeking a dialogue through our posts on social media, our website and those of members and allies; by convening spaces, for instance through monthly calls and regular meetings for dialogue and information sharing; and by thought-leadership through regular blogging and contributions to platforms of peers and like-minded actors in academia and a biennial International Conference which brings together Eurodad members, allies and other like-minded actors around a current theme related to our work.
- **Supporting and building coalitions:** We will coordinate advocacy and related communications, as appropriate at European level, including coordinated national level action across European states. We will participate in and support broader regional and global coalitions. We will strengthen the relationship with our sister Debt and Development networks. Our coalition-building work will include strengthening our members and seeking new members and allies

In doing so we will uphold the following basic principles:

- **Flexibility:** While maintaining a clear vision of our objectives, for the medium and long term, we will adopt a flexible approach for our strategies in the short-term. We will develop an understanding of what our most useful contribution can be in any given situation to making the desired transformative policy changes happen, while recognising the strengths of our members, our allies and partners and other actors. To do so, we will not be prescriptive about tactics and tools to use. We will decide upon these based on the goals we are pursuing, the external opportunities that are available, and the strength of the coalitions we are part of.
- **Knowledge-building:** The nature of our objectives is complex. We realise that many of our members and others in civil society - including potential members and allies need to build their understanding and capacity before they are able to actively participate in coalitions for

change for economic justice. We will therefore invest in systems to share our tools and learning with them through webinars, the website and the Knowledge Management Platform (KMP). In a similar vein, experience has taught us that we cannot launch into work on new issues without dedicating adequate time and space to learn and understand them and build our capacity to work on them. We will seek the support and expertise within our membership, allies and partners to build the capacity of the network in this regard, for example through workshops, webinars and sessions at the biennial Policy Forum.

- **Sustainability:** We will budget our time and finances carefully and with foresight to prevent overstretching ourselves and to ensure that we have the resources to achieve what we have set out to do. A financial sustainability strategy will ensure that we strengthen financial resilience and are able to optimally allocate existing resources and our funding-pipeline system will allow us to actively plan to maintain adequate levels of resources in the future. We will uphold the principle that having one dedicated person is the starting condition to undertake active advocacy on an issue. At the same time, a secretariat with a good mix of skills and competences and a cross-disciplinary approach will ensure the sustainability of Eurodad's work. Last but not least, we will put in place mechanisms to build and strengthen a culture of care and well-being within the Secretariat.
- **Planning, Monitoring, Evaluation, and learning (MEL):** The strategy is supported by an updated MEL framework and system to monitor our performance and impact, to evaluate them carefully and systematically and to learn from our failure and success. Being new, these systems will be evaluated in the course of the strategy's implementation.

II. The secretariat

The success of the secretariat depends on highly skilled and motivated staff. A supportive and professional environment, high team morale and motivation, attention to work-life balance and competitive salaries and benefits contribute to this. A robust recruitment process allows us to hire exceptional candidates from an extremely strong shortlist. Systems in place allow for constant learning and development. The annual appraisal and organisational health-check, alongside informal spaces including annual director-staff conversations, team retreats, monthly check-ins between line-managers and staff ensure that feedback is given and received in a safe and trusting environment. Eurodad will uphold and build upon the policies and practices already put in place, with particular and systematic attention for burn-out prevention, detection and response. Eurodad cross-cutting priority on gender justice, women's and gender minority rights' will be integrated into our internal policies and practices.

In the next five years Eurodad will also strive to grow horizontal leadership and responsibility and enhance collaboration and synergy-building across our areas of work.

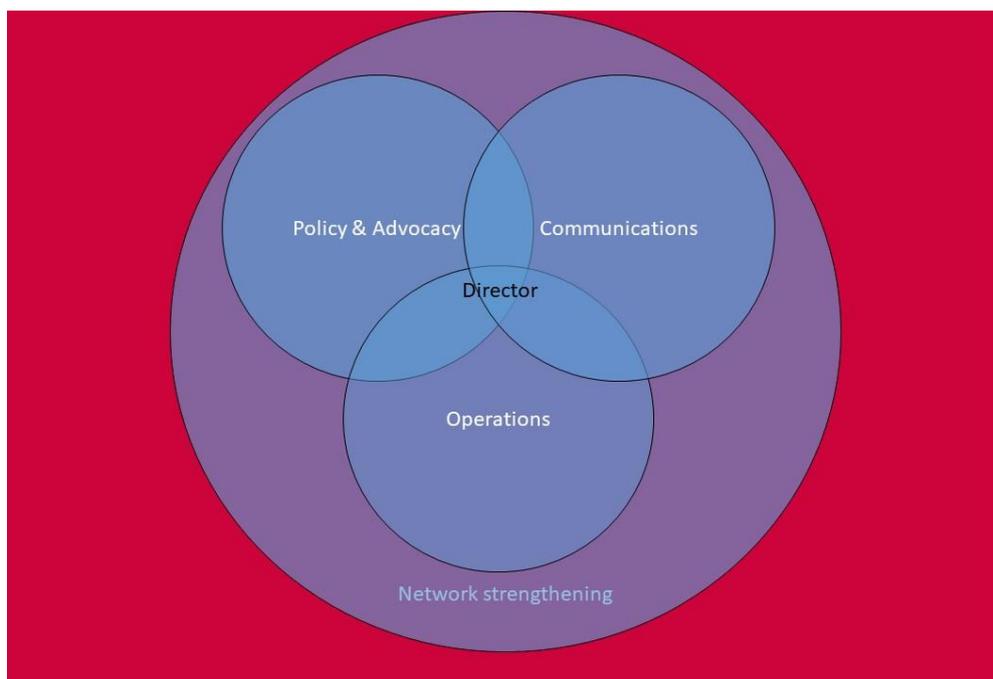
Eurodad's secretariat consists of the following teams:

1. **The Management team:** The Management team consists of the Director, the Head of Operations, the Communications Manager and 3 Policy and Advocacy Managers who are the policy leads for Eurodad's three policy priorities (tax justice, debt justice and development finance covering the areas of effective aid, publicly backed private finance, climate finance and IFI policies and programmes). The main responsibility of the Management team is to ensure that Eurodad remains well funded, that resources are managed effectively and with the wellbeing of staff in mind, and that the organisation continues to develop. It monitors the

Secretariat's target organogram to ensure it reflects the human resource needs of a dynamic team. The Management team leads the policy, advocacy and communications work of Eurodad and the management of the organisation as a whole. Within the Management Team, the Director is the link between the Management Team and Eurodad's Board of Directors and ensures accountability and communication between both bodies.

2. **The Staff team:** The Staff team consists of all staff members except the Management Team. It is coordinated by two staff representatives that are elected annually. Staff representatives convene periodic Staff team meetings. They address relevant issues raised at the Staff team meeting to the Director and Head of Operations for necessary action and/or further discussion with the Management Team. They are invited to participate in the monthly Management Team meetings. They are also consulted before new personnel-related policies such as the annual revision of internal regulations, policies to improve team well-being and organisational health are finalised.
3. **The Policy team:** 3 policy teams on tax justice, debt justice and development finance consist of Policy and Advocacy Managers, Policy and Advocacy Officers, Assistants and interns. The main responsibilities of the policy teams are to monitor and participate in official and CSO processes, produce policy briefs and analysis, conduct research, coordinate advocacy with Eurodad members and allies and participate in or lead broader civil society coalitions.
4. **The Communications team:** The Communications team consists of the Communications Manager, a Communications Officer, Assistant and an intern. The main responsibilities of this team are to inform Eurodad's membership and other stakeholders (allies, partners and donors) at the first level, key targets (officials and decision makers in the EU, UN, IFIs and OECD) at the second level and the general public at the third level of Eurodad's vision and positions, our activities as well as our views on current affairs in the areas that Eurodad works on. The main channels of communications are a bimonthly newsletter, Eurodad's website and social media alongside proactive media-outreach through press releases, and opinion articles.
5. **The Operations Team:** The Operations Team consists of the Head of Operations, Finance and HR officers, Operations Officers and an intern. Their main responsibilities are financial management and oversight, grants and fundraising coordination, human resource policies and systems, governance and legal requirements, office, events and travel administration and coordinating Eurodad's planning, reporting, monitoring and evaluation systems.
6. **Gender Task Force:** The Gender Task force consists of Eurodad's Gender Focal Point and one or two members from all secretariat teams. The Gender Task Force formulates and monitors the implementation of the annual Gender Work-plan consisting of external advocacy activities and outputs, internal capacity building and organisational development issues.
7. **Network Outreach Team:** The Network Outreach Team consists of the Network Outreach Coordinator and Assistant, the Director, the Head of Operations and the Communications Manager. The main responsibility of this team is to implement the network strengthening objectives of Eurodad to strengthen the effectiveness of the network. On the one hand this involves seeking new members and allies, particularly in countries where we do not have members. On the other hand, this involves strengthening the capacity of the network and our members to act jointly and to share advocacy resources.

Diagram: Eurodad organisational structures



Secretariat targets

1. Strengthened ability to monitor and assess the impact of Eurodad's research and analysis, directly on desired policy change/processes and indirectly, on effective, joint CSO advocacy.	An updated Planning, Monitoring, Evaluation & Learning (MEL) framework is put in place and its efficiency is evaluated in the course of the strategy's implementation.
2. Strengthened financial resilience and ability to optimally allocate existing resources	A financial sustainability strategy is designed, based on best practice and examples from members and peers in the sector.
3. Active planning to maintain adequate levels of resources in the future.	An updated funding-pipeline system is maintained based on pro-active surveying of prospective funding opportunities.
4. A culture of care is built and staff morale remains high.	<ul style="list-style-type: none"> - Persons of trust and a 'buddy' system reinforces a culture of care. - A task-force consisting of volunteers from the secretariat and the Director assumes responsibility for the annual organisational health survey and appropriate support (trainings etc) for staff well-being.
5. An updated target organogram maps the existing human resource situation and identifies open gaps and needs	The Management team monitors the target organogram periodically and the organogram forms the basis of new recruitments.
6. An annual gender workplan summarises external advocacy activities and outputs, internal capacity building and organisational development issues that would further the 5-year objectives on gender justice and women and gender minorities' rights.	The Gender Task Force formulates and monitors the implementation of the annual work plans.

III. The Network

A. Strengthening the current network - stronger together

We will seek to ensure that CSOs in all their diversity, from large international organisations to small, specialist organisations can effectively engage in our work. The spaces Eurodad provides for engagement and collaboration are through listservs for CSO, our website, our Knowledge management platform, our fortnightly newsletter, our social media channels, biennial International Conference and Policy Forum (alternate years), monthly teleconferences and biannual face-to-face strategy meetings in each issue area and specific projects and campaigns.

New tools such as the website, Knowledge Management Platform and upgraded work-plans are designed and harnessed to fulfil Eurodad’s Theory of Change of building powerful coalitions, working in Europe, with partners from other regions and globally to change the policies and practices of multilateral institutions. Special attention is paid to our cross-cutting priority of gender justice and womens’ and gender minorities’ rights, to ensure integration into the strategies themselves as well as the process to design them.

To be as inclusive as possible, we will uphold the following principles.

- We will not prescribe ways of working, but rather agree these annually with the network’s membership, partners and allies, based on what is the most effective approach to achieve change on each issue we work on.
- Collaborators, whether members, partners or allies, are free to choose at which level they wish to engage, and to engage in different ways on different issues.

B. Strengthening Eurodad membership

At the start of the 2021-25 strategy Eurodad has 54 members and five statutory allies and will seek to increase its membership to other European countries where it does not have members. As the knowledge barrier has been identified as a key challenge for new or potential members we will continue to invest in tools such as the Knowledge Management Platform and capacity building sessions to address this. . Eurodad aims at representing development NGOs in its diversity - from big INGOs to small specialised CSOs. Newly started work on climate justice, financial sector regulation and gnder will create opportunities to expand the networks we are part of as well as our own membership. Last but not least, gender diversity in CSO representation within the Eurodad network is key and will be closely monitored in order to achieve at least 50% women representation in Eurodad meetings, panels and decision-making spaces.

Network Strengthening targets

1. At least 10 new members and allies, explore cooperation with Eurodad.	Joint activities organised with all new members and allies, together with the Eurodad secretariat, the Network Strengthening Group and where relevant, with other Eurodad members.
2. Eurodad gains members/allies in European countries where we do not have any members/allies	Membership applications
3. New members/allies make maximum	- A “welcome package” is created for new

<p>use of Eurodad systems for joint planning, coordination, strategising, learning and sharing.</p>	<p>members/allies, including information sessions on Eurodad KMP system and website.</p> <ul style="list-style-type: none"> - New members/allies use the KMP system and website. - Tailor-made capacity building webinars and online trainings made available in order to integrate and upgrade the knowledge level
<p>4. Gender diversity</p>	<ul style="list-style-type: none"> - Increased and systematic engagement with women's/gender minorities' groups - Eurodad reports at least 50% participation of women in activities - Eurodad's membership and secretariat are able to support the cross-cutting objectives on gender justice and women's and gender minorities' rights.

C. Partners and allies

We believe that building and supporting powerful coalitions for change are an essential part of our work to achieve the long-term structural change we seek with shorter-term transformative policy change 'wins.' Strengthening the work of Eurodad's members and allies at the European, national and local level is a necessary part of the efforts of our partners- notably Eurodad's sister debt and development networks, and peers all over the world, particularly in the Global South.

5-year targets

- We will support the development of global strategies, in a collaborative and equal manner, starting with alliances that have already built up such strategies such as the Global Alliance for Tax Justice, Reality of Aid and the global Public Private Partnerships campaign.
- We will align our positions with theirs, and attempt to develop joint positions wherever possible.
- We will invest in joint actions where feasible.
- We will strengthen our engagement with our sister Debt and Development networks, with more joint strategizing, developing joint projects, including joint fundraising efforts and jointly approaching funders. We will achieve this through monthly teleconferences, and seeking opportunities for deepened learning and sharing between secretariats.
- We will maintain an updated mapping of partners and allies that Eurodad works with and like-minded organisations and coalitions/networks that we do not work with yet (network outreach plan). This will provide us a clear idea of the regions and issues that are supported by strong coalitions and where more effort is needed.
- We will analyse membership and individual engagement and make sure we reach at least 50% representation of women.
- We will seek a mutually beneficial engagement with our partners- inviting them to be part of internal and policy-based strategic discussions and being open to engage in theirs; sharing and learning on both policy and operational issues.

IV. Guidelines for Planning and Monitoring, Evaluation and Learning (MEL)

These guidelines will support Eurodad to develop and implement effectively coordinated and well-targeted advocacy strategies and to monitor and evaluate them to ensure they fulfil the said aims of effective coordination and strategic targeting. Particular attention is paid to accessibility of knowledge resources for Eurodad’s members and allies as well as partners and allies world-wide. The guidelines have been designed building on the feedback and best practice in the network and the membership. This was collected in the evaluation of Eurodad 2015-19 strategy, the evaluation of Eurodad’s communication tools and the 2020 review of Eurodad’s Monitoring, Evaluation and Learning systems. The guidelines will be subject to further review in the course of the strategy.

Planning, Monitoring, Evaluation, Learning and stakeholder engagement herein

Eurodad believes that well-informed, well-resourced and well-organised civil society working collaboratively at the local, national and international levels play an essential role to achieve the transformation of the global financial landscape that we seek.

The secretariat’s Planning, Monitoring, Evaluation and Learning systems will be designed to allow Eurodad to maximise the impact of its work while being inclusive. The systems will be built on 4 pillars: Planning, Monitoring, Evaluation and Learning.

Table: Planning, Monitoring, Evaluation and Learning objectives

Well-informed, well-resourced and well-organised civil society working collaboratively at the local, national and international levels to achieve the transformation of the global financial landscape that we seek.			
↑	↑	↑	↑
Planning	Monitoring	Evaluation	Learning
<p>Advocacy strategies and joint activities with members, partners and allies are based on adequate information provided by the Results framework, workplans and use of all Eurodad spaces for collaboration: listservs, strategy calls/meetings and Knowledge Management Platform.</p> <p>Annual work-plans are agreed through meaningful consultation with members, partners and allies based on what is the most effective approach to achieve change on each issue we work on.</p>	<p>Strong and cohesive coalitions deliver advocacy results thanks to systematic and meaningful monitoring.</p> <p>Monitoring tools and indicators allow for efficient reporting and enable transparent accountability.</p>	<p>Best practice, challenges and learnings are captured as soon as possible after the completion of an activity or an event.</p> <p>Objective evaluations of major projects and the strategy (mid-term and end-term)</p> <p>Internal appraisals provide learning and growing opportunities.</p>	<p>A participatory learning environment is provided by the Knowledge Management Platform, alongside Eurodad’s website.</p> <p>Capacity-building is an important pillar of advocacy strategies</p>

A. Planning

A results framework built on Eurodad’s strategy and informed by grant-based commitments will form the basis all planning, including policy-based strategic discussions and consultations with members,

allies and partners. These will also inform the development of annual work-plans. Strategy meetings in the fourth trimester will be the basis of the coming year's work-plans.

There will be internal secretariat meetings to review work-plans, discuss advocacy opportunities and strategy every trimester alongside regular policy calls and meetings to plan and strategise with members, allies and partners. Draft work-plans will be presented and discussed in joint end-of-year meetings of the Board of Directors and secretariat staff and approved by the General Assembly.

Work-plans to be shared with members, allies and partners will serve the following aims:

- Provide members, partners and allies with the information needed to engage with Eurodad's joint work.
- Enable members, partners and allies to use this information to plan their own work.
- Explain how our annual objectives will contribute to our 5-year objectives.

Additionally, an organisation-wide 'internal Management Plan' will be used for planning, coordination, monitoring and serve as the basis for reporting and accountability to all Eurodad's stakeholders.

The new work plan formats will be reviewed during the Strategic period.

B. Monitoring

The second pillar is our Monitoring systems. Systematic and meaningful monitoring will guide and keep Eurodad on track to build strong and cohesive coalitions that can deliver advocacy results. The monitoring system includes periodic check-ins to review work-plan implementation and a budget and output check. It will also track achievement of outcomes and indicators on a weekly basis. A system of checks involving each level of the Secretariat (team-wide, Management and Director) will ensure that challenges and concerns are addressed at the most appropriate level, as immediately as needed.

C. Evaluation

The third pillar is our systems of evaluation. We will ensure that best practice, challenges and learnings are captured as soon as possible after the completion of an activity or an event. Eurodad will build on current evaluation practices including rapid reviews and fixed slots to capture learnings at weekly meetings and periodic planning meetings.

The space for individual evaluation and learning are equally important and will be addressed through annual appraisals and annual individual learning & development plans. Recognising the importance of organisational culture and enabling individual learning and growth the secretariat will build on the practice of organising an anonymised, annual survey of organisational culture, practices and policies to ensure that staff feel happy, healthy and fulfilled by their work.

Beyond the regular and annual evaluations, we will work with expert consultants to objectively evaluate major projects and our strategy, including a mid-term review.

D. Capturing learning and best practice: Knowledge Management Platform.

Alongside Eurodad's website, the Knowledge Management Platform (KMP) will provide a participatory learning environment to share ideas, information and resources among members, allies, potential members/allies and the Secretariat. It is part of the network strengthening objectives of the Strategy.

The Knowledge Management Platform is an 'intranet' through which Eurodad aims to:

- a) Provide Eurodad members and allies access to additional clear and easily searchable information to build expertise on Eurodad's policy areas.
- b) Provides tools to coordinate across different regions on advocacy and campaign actions.

The following key principles were developed by Eurodad's Knowledge Management Platform Taskforce consisting of representatives from the Secretariat and members. They will inform the development and use of the Knowledge Management Platform.

- The decision about what knowledge/content is to be featured/managed on the platform will be driven by the needs of members and staff.
- Levels of confidentiality and permissions are essential (Eurodad only / Members / Active allies / Allies / External, prospects).
- The platform will be accessible in all regions, including in the global south. Easy access would mean no download of software, short explainer videos/tutorials work well on technical issues (how to use online tools, software etc.),
- It will be easy and user-friendly.
- It will be kept up-to-date, with clarity of roles between the secretariat and members/allies.
- It will be a learning & collaboration platform and not just for exchange of information / a repository.

V. Communications Plan

A. Goal and objectives

- The **goals of Eurodad's communications work are to:**
 - make Eurodad's research, analysis and advocacy actions more **influential and recognised**, so that they contribute to our strategic objectives;
 - help build and support strong coalitions for change amongst civil society and our allies.
- The **objectives** of this strategy are to ensure that our key targets:
 - **Know** who Eurodad is and know about our research, analysis, campaigns and advocacy actions.
 - **Understand** our key messages, main findings and recommendations.
 - **Change** their perceptions, opinions and actions as a result.

B. Targets

Our target audiences remain largely unchanged. However, we have built stronger tools to segment and attract those audiences and we have strengthened our capacity to reach them.

Key targets

The people we have at the front of our minds when we prepare anything to be communicated externally.

1. CSO staff in the global north and south who are influential on development finance issues. They include, for example:

- Eurodad members and allies
- NGOs and INGOs that work on the issues we are focused on including the feminist movement
- Campaigning organisations
- Other networks.

These are those policy staff and senior managers that, through their position, their work and their own communications are in a position to influence their organisation's strategies and even the strategy of the sector as a whole. They may also reach the public, where that is one of the objectives of our joint work.

2. Officials and decision-makers (IGOs, European institutions, bilateral organisations) who work on our issues and who we are trying to influence.

Their influencers

The people who will reach our influencers

- Journalists / media (we communicate with the media to reach the primary targets, put pressure on officials and decision-makers and raise the profile of our work).
- Opinion formers – eg think tanks and academics, former officials and decision-makers (if our ideas are picked up, they will become more influential amongst our primary targets).

C. Situation: SWOT analysis of our communications work in January 2021

Strengths

Strong communications tools/ team:

We enter the 2021-25 period with a new website which clearly communicates our vision and the high quality analysis combined with calls to action that we produce. This 'shop window' is built on the Nationbuilder \platform, which provides a new CRM and allows us to segment our audiences (see previous comms strategy objectives). We can now build engagement paths for the people we want to work with and those we want to influence; and view our impact (newsletter/ website/ emails/ events) in one place. We also have an integrated knowledge management platform, offering members and allies a tool to learn and collaborate.

We have a broad database of media contacts built up over years of strategic external communications work. Our reputation is good.

Our communications team now incorporates the full range of skills we need to build effective communications and campaign packages that help our policy and advocacy teams to attract their audiences and achieve the change they want to make. We also have a range of external designers,

proofreaders and translators that understand our objectives and support the daily workload of the team.

Weaknesses

Internal communications within the secretariat

The combination of a global pandemic/ remote working and growing staff numbers (from 16 to 25 in 12 months) means that internal communications has become far more challenging. This situation can create confusion about:

- who communicates and what they should communicate about;
- the roles \ responsibilities of the communications team and of the different members of the policy and advocacy teams.

This could threaten to seep into our wider work with members and partners if we do not put stronger guidance in place. At the same time, we do not want to change the overall culture of our communications with unnecessary red tape.

Opportunities

A growing external profile

In 2020 we worked closely with CSO colleagues in the global south and north when the pandemic and resulting health and economic crisis propelled our issues into the spotlight. We continued to produce high-quality research and analysis and support civil society movements. The Eurodad network itself also grew due to the network strengthening work, with allies and members in 28 European countries. It also grew in terms of its policy areas, introducing Climate Finance. Therefore, we have a whole new group of CSOs to communicate with.

We also worked well with journalists and there were multiple media opportunities to communicate our key messages and showcase the analysis Eurodad is known for. Overall, Eurodad was mentioned 3,500 times (this includes social media posts we were tagged in), of which 2,500 were media mentions.

- Debt Justice: 1,900 mentions
- Tax Justice: 1,400 mentions
- Development Finance: 1,200 mentions

This more prominent position can and should be capitalised on as we move forward to implement the new five-year strategy.

Threats

The combination of a growing external profile, new policy areas with new CSO partners, increasing staff numbers and some remote working, mean there are increased threats. This includes:

- Potential for confusion about what, when and how we communicate externally on our range of issues, eg with journalists and with our members and partners.

- A threat that we could be targeted by organisations/ individuals hostile to our messages or we could put out a message that is contrary to our narrative and that of our members and partners. This threatens our external reputation. The lack of a crisis communications plan exacerbates that threat.
- New tools such as the Nationbuilder system could be underused or misused.

D. Action plan/ how we will work

We will develop a number of systems to build on the strengths we have identified and seize the opportunities of the coming years. We will also tackle any organisational weaknesses and prepare for threats that might undermine the goals of the network.

Internal communications:

The Eurodad secretariat is a small but complex team with a mix of office and home working and a range of roles. We want to deliver a light touch internal communications plan which ensures staff know where they can find information and the roles and responsibilities of different teams.

The communications team will work with the operations team to:

- Audit how we communicate currently and where the pinch points are (using feedback from burnout training 2021/ how other organisations work).
- Develop a short plan in collaboration with staff that outlines how we want to communicate internally and how often.
- Monitor the results including staff feedback every six months.

The Communications Team will work with the PAMs to develop:

- Position papers for each new policy area and for major events/ policy change moments.
- Updates to website pages for longstanding policy areas when necessary.

External communications:

The communications teams will develop the following:

- Update of **research TORs and dissemination plans** in collaboration with the management team to ensure these templates provide what we need (see internal communications). This is to ensure research is coordinated well internally and reaches the target audiences.
- **Nationbuilder guidance and strategy sessions for staff.** This is to ensure that staff understand how they should use Nationbuilder and how we do not use it, and that this system becomes part of everyday advocacy outreach at Eurodad. This will also include analysis of individual campaigns as well as annual reviews.
- **Updated media guidance.** This will define how we work with the media, who talks to the media and when and where training should be given.
- **Social media strategy.** This will define how we work, and the impact we want to make, including measurable goals, and will incorporate training. We will also incorporate guidelines for blogging.
- **Newsletter strategy.** This will define measurable goals for who we want to reach and learning and evaluation from open rates and click rates.

- **Citations record.** We will update this system to ensure we capture meaningful use of our work amongst our target audiences.
- **Crisis Communications Plan.** This short plan will define the internal process when Eurodad's reputation comes under attack or when any other reputational risk arises.

Yearly workplans and integrating comms into Policy and Advocacy workplans

The Communications Team will work with policy and advocacy teams to integrate communications into their plans at the earliest opportunity and will produce its own annual workplan to implement this strategy.

At the same time, all Eurodad staff must continue to ensure that:

- Our rapid reactions to external opportunities are **timely and up-to-date**. This means involving communications at the earliest opportunity.
- **We communicate complex ideas clearly**, without jargon. This is so that we reach all of our target audiences.
- **Our analysis is strategic and useful** for advocacy and campaigning. TORs and dissemination plans will assist with this.
- **We know what we are talking about.** We have a strong evidence base grounded in our research, and we understand the information we are analysing, and take care to always be accurate. We do not tread on the space of Northern or Southern partners where they are better placed to comment.

Monitoring, evaluation, accountability and learning

The communications team is responsible for comms-related monitoring of our impact at the end of every campaign/ major advocacy moment and we will produce general reports every three months to ensure we learn and evolve. We will link our monitoring and evaluation systems to our aims and objectives – ensuring as far as possible that we know whether the audience does: know, understand and act (Objectives).

The tools we have to do this are:

- Google analytics – this will monitor the use of our website, the audiences we are attracting and the actions they are taking.
- Nationbuilder analytics – this lets us know who we are reaching in our target audience groups and the actions we are inspiring eg do our target audiences read the newsletter and what do they read, who is attending our events.....
- Cision media monitoring – this will allow us to know where our reactions, research and analysis is being covered in the media and the size and type of audience we are likely to reach.
- Social media analytics – this will tell us who is interacting with our outputs and our calls to action.

We will also carry out an impact evaluation with our targets to test our assumptions related to them. We shall do this as part of Eurodad's mid-term strategic review.



european network on
debt and development

ANNUAL REPORT

eurodad

Who we are and what we do

The European Network on Debt and Development (Eurodad) continues to play a vital role in European and global civil society initiatives on tax justice, effective aid, ending debt crises and publicly-backed private finance, as well as related economic and financial policy issues affecting the global south and north. As of December 2021, the network consisted of 53 European NGOs and seven statutory allies in 29 countries. This includes all the main European NGOs involved in development finance, and comprises large and small groups, as well as religious and other specialist networks and platforms. Member organisations are supported by the Eurodad secretariat, which is located in Brussels. Eurodad is also in continuous dialogue about policy developments and priorities with partner networks from the global south.

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Eurodad member organisations in 2021

Austria

- KOO

Belgium

- CNCD-11.11.11
- 11.11.11

Bulgaria

- BGRF - Bulgarian Gender Research Foundation

Croatia

- CROSOL - the Croatian Platform for International Citizen Solidarity

Czech Republic

- Ecumenical Academy Prague
- Glopolis

Denmark

- Oxfam IBIS
- GLOBALT FOKUS

Estonia

- AKU: Estonian Roundtable for Development Cooperation (MTÜ Arengukoostöö Ümarlaud)

Europe

- ActionAid International

Finland

- Fingo - Finnish Development NGOs

France

- CCFD-Terre Solidaire
- Oxfam France

Germany

- Erlassjahr.de
- WEED - World Economy, Ecology and Development

Hungary

- DemNet
- National Society of Conservationists – Friends of the Earth Hungary

Ireland

- Financial Justice Ireland
- Trócaire

Italy

- Re:Common

Lithuania

- Lithuanian National Platform of Non-Governmental Development Cooperation Organizations

Luxembourg

- Cercle de Coopération des ONG de développement

Malta

- KOPIN - Koperazzjoni Internazzjonali

The Netherlands

- Re-course
- Both ENDS
- SOMO – Centre for Research on Multinational Corporations
- Oxfam Novib
- WEMOS

Norway

- Norwegian Church Aid
- Norwegian Forum for Development and Environment
- Redd Barna - Save the Children Norway
- SLUG – Debt Justice Norway

Poland

- IGO - Institute of Global Responsibility

Serbia

- CEKOR

Slovenia

- Ekvilib Institute
- FOCUS

Spain

- Oxfam Intermón
- ODG - Observatori del deute en la globalització

Sweden

- Church of Sweden Aid
- Diakonia
- Forum Syd

Switzerland

- Alliance Sud
- Public Eye

United Kingdom

- Bretton Woods Project
- Christian Aid
- Equality Trust
- Global Justice Now
- Jubilee Debt Campaign
- Jubilee Scotland
- Oxfam GB
- Save the Children UK
- WaterAid

STATUTORY ALLIES

Bulgaria

- Za Zemiata, Friends of the Earth Bulgaria

Germany

- Urgewald
- Global Policy Forum

Latvia

- LAPAS: The Latvian NGO Platform

Norway

- Changemaker (from June)

Portugal

- ACEP: Associação para a Cooperação entre Povos

Romania

- Federatia Organizatiilor Neguvernamentale pentru Dezvoltare din Romania - FOND (from June)

Slovakia

- Ambrela: Platforma rozvojových organizácií, the Slovakian NGO Platform



A note from our Chair

Eurodad entered 2021 with a spirit of optimism that the pandemic could be overcome if the international community rose to the challenge of ensuring equal vaccine access to all countries, starting with those sections of society that needed it the most.

However, the international community did not rise to the challenge, multilateral initiatives for vaccine access remained underfunded and vaccine apartheid was a reality, dividing the world into vaccine 'haves' and 'have-nots'. It eliminated any chance of a speedy health, social and economic recovery from the Covid-19 pandemic for the 'have-nots'. The G20's **2020 communique**, declaring that 'coordinated global action, solidarity and multilateral cooperation are more necessary today than ever to overcome the current challenges and realise opportunities of the 21st century for all by empowering people, safeguarding the planet, and shaping new frontiers' rung hollow and hypocritical. Or as the **UN Secretary General put it**: "Unfortunately words by themselves will not end the pandemic – or curb the impact of the climate crisis."

Aggravating the situation, the world witnessed **extreme climate events** in 2021. From Haiti to Algeria and the Philippines, countries on the frontlines of climate change had to cope with its impacts with a meagre purse to finance adaptation and mitigation, let alone loss and damage. COP26 – the climate summit of 2022 – did not substantially change the size of this purse.

The international community also failed to adequately respond to the growing debt crisis in the global south, to uphold commitments on ODA without inflating aid figures, and to effectively tackle corporate tax avoidance and illicit financial flows. Instead the credibility and legitimacy of the World Bank – and by extension the Bretton Woods Institutions – was undermined by investigations into the 2018 and 2020 editions of the World Bank's Doing Business Report and the political games in Washington DC around the investigation. Indeed, the decision to discontinue the DB Report was a testimony to the relentless civil society campaigning, in which Eurodad was actively involved, that raised awareness of the problematic methodology and impact of the DBR.

The IMF's decision to issue US\$650 billion worth of Special Drawing Rights in August 2021 was also the result of the successful collaborative effort led by regional Debt and Development sister organisations, including Eurodad, that started soon after the outbreak of the Covid-19 pandemic in 2020.

“ The decision to discontinue the Doing Business Report was a testimony to the relentless civil society campaigning, in which Eurodad was actively involved, that raised awareness of the problematic methodology and impact of the DBR.”

Internally, Eurodad entered a new phase with the implementation of our new Strategic Plan. Thanks to the extra effort to ensure that the plan reflected the impacts of the pandemic on the network and its policy work, Eurodad continued to work effectively and impactfully despite the extension of lockdown measures. We did so with an unprecedented number of new members and allies, as well as with a secretariat that continues to grow in size. This has strengthened our outreach but has also demanded increased coordination. The secretariat has focused on strengthening and renewing systems for advocacy planning and coordination, communications, planning, monitoring, evaluation and accountability.

The resulting capacity building, coordinated strategising and joint action translated into impactful work together with Eurodad members, allies and partners. For example: joint advocacy to prevent the inflation of ODA figures with excess vaccine donations; the strong push for developing countries to be able to participate on a truly equal footing in rule making on global tax issues, and for increasing transparency at EU level; the successful online campaign action on debt and climate justice; the positive reception of the ‘Debt Wednesdays’ capacity-building webinar series; as well as Eurodad’s coordination with our members at COP26 in Glasgow.

These are just some of the achievements of 2021. They are a testimony to the hard-work and expertise of the secretariat, the commitment and enthusiasm of Eurodad’s members and support from our partners, allies and funders from around the world.

Dominik Gross

Chair of Eurodad

Our objectives for 2022

The world is still struggling to deal with the fall-out of the pandemic and lockdowns. Moreover, for the small group of countries that the G20's Debt Service Suspension Initiative (DSSI) offered temporary respite from servicing their debts to, 2022 comes with the additional financial burden of servicing and repaying debts, often at the cost of the welfare of their populations.

The international community has failed them and a large number of countries whose debt burdens are too heavy to service because of the failure to put in place a fair, transparent debt workout mechanism which would cover all creditors. Eurodad warned of this problem even before the outbreak of the pandemic and demonstrated that the G20's DSSI initiative was not a satisfactory response.

While the Global North injected trillions of dollars into their economies thanks to the Global Financial Safety Net that they enjoy access to, the Global South was left in the lurch. Along with the failed debt response, these countries only received one-third of the new Special Drawing Rights (SDRs) issued by the IMF last year. They also face an increasingly severe economic outlook as a result of measures being taken by the US and EU to control inflation. Adding to all of this are the food, energy and geopolitical crises that have been triggered by the Russian invasion of Ukraine.

Divergence in the economic outlook feeding into already existing deep inequalities between and within countries was the main concern at the start of 2022. This fear of divergence has dissolved into a fear of disaster, with factors such as food riots and shortages of finance that could lead to social conflict and political instability. The world could not be further away from the pathway to reach the 2030 target of the Sustainable Development Goals.

Responses to these crises until now have been inadequate or have completely failed. Debt relief provided through ad-hoc initiatives, starting from the Highly Indebted Poor Countries Initiative until the current Common Framework for Debt treatments, have failed to address more fundamental problems including the issue of illegitimate debt and the broader issue of the 'financial bleed' from the Global South to the Global North.

“ As each new crisis feeds off the other, and against a background of growing ecological breakdown and climate chaos, Eurodad calls for a reboot of the system.”

A large part of the finance bleeding from south to north is because of the broken global tax governance system. Tax rules and norms are still set in forums that are dominated by a small group of developed countries. As a result, measures to stop tax-related illicit financial flows, including large-scale international tax avoidance and evasion, have failed the majority of countries, and the global tax system remains deeply flawed and open to abuse. Donor countries that justify their dwindling aid budgets by arguing that their 'partners' in the Global South should make a greater effort to mobilise resources domestically are cynical and cruel in this context. This sorry state of affairs is exacerbated by the blatant inflation of Official Development Assistance (ODA), including the most recent attempt in 2021 to sanction the counting of excess Covid-19 vaccine donations as ODA.

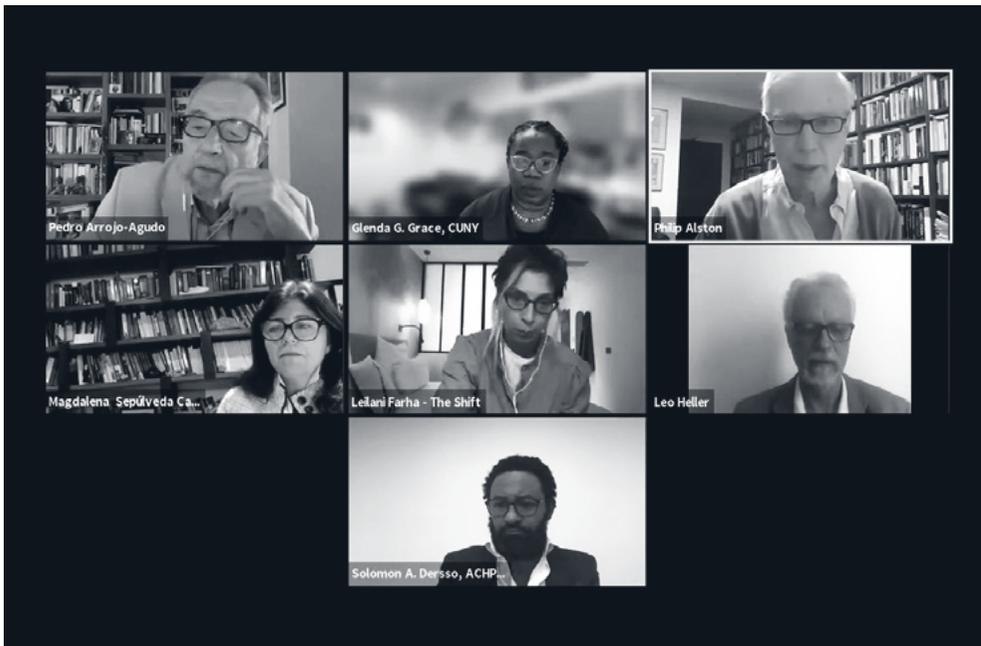
Alongside this is the ongoing effort to count instruments using public money as leverage for private finance flows to partner countries that new research from Eurodad has shown to also increase the risk of tied aid. The use of public money to leverage private finance is informed by the 'Wall Street' consensus, based more on the assumption that private finance can - and should - easily replace public finance to deliver sustainable development more efficiently rather than on any hard evidence. This consensus has shaped the multilateral response to the pandemic, most visibly formulated in the World Bank's Green and Inclusive Recovery and Development. All-pervasive as this consensus is, it is increasingly dictating approaches to the allocation and delivery of climate finance.

As each new crisis feeds off the other, and against a background of growing ecological breakdown and climate chaos, Eurodad calls for a reboot of the system. This has been the clarion call of civil society since the start of the pandemic when we asked the UN to convene an Economic Reconstruction and Systemic Reform Summit. This call is central to Eurodad's advocacy focus in 2022.

Along these lines, Eurodad intends to step up our advocacy effort to call for a fourth Financing for Development Conference, 20 years after the Monterrey Consensus, a milestone agreement securing commitments from the global north and the global south on development finance. It is also the theme of the biennial International Conference in Brussels in June 2022 and the red-thread through Eurodad's agenda-setting reports, briefings and other communications this year.

Together with our members, partners and allies in the global economic justice movement, Eurodad is committed to using our vision, creativity and experience to ensure that 2022 can be a turning point for economic justice.

In detail: Eurodad's work in 2021



tax justice

“ Eurodad has steadfastly worked with Southern partners and a broad range of CSOs and allies, calling attention to inequity in global tax rules and rulemaking and articulating solutions and policy alternatives. In 2021 we faced many challenges as well as opportunities in the advocacy for a UN Tax Body and a UN Tax Convention, and against this context, Eurodad played a very crucial role in catalyzing strong civil society response, including timely, strategic, and substantive interventions in global policy platforms.”

Jeannie Manipon

Asian Peoples' Movement on
Debt and Development

A strong civil society response to international discussions about new global tax rules

Pressuring for more ambitious transparency rules at EU level

Growing international recognition of the need for a new UN Convention on Tax

In 2021, Eurodad continued to follow the international discussion about new global tax rules, including the OECD-led negotiations under the so-called Inclusive Framework. Together with the Global Alliance for Tax Justice Eurodad coordinated a broad group of civil society organisations and trade unions working together to analyse and comment on the negotiations. Following the leadership of our Southern partners, Eurodad and its members and other allies raised strong concerns about both the process and the outcome of the negotiations. At the core of the concerns was the fact that developing countries had not been able to participate on an equal footing in the negotiations, and that the outcome had been strongly steered by a small group of developed countries. As a result, the proposed new global tax rules were biased against the interests of developing countries. Furthermore, Eurodad and many others raised concerns that the new rule package would increase the complexity and inefficiency of the international tax system.

While criticizing the OECD-led process, and playing an ever growing role in the global media debate on the issue, Eurodad and our members and allies reiterated the call for the establishment of a truly inclusive intergovernmental tax body under the auspices of the United Nations, as well as the negotiation of a comprehensive UN Tax Convention – a proposal that was originally put forward by the Africa Group at the United Nations in 2019.

Despite the pandemic and ongoing lockdowns, a new and important momentum started building up at the UN-level throughout 2021. In February 2021, the **final report** of the High-level Panel on International Financial Accountability, Integrity and Transparency for Achieving the 2030 Agenda (the FACTI Panel) was published, and the intergovernmental UN tax body and UN Tax Convention were included as key elements of the recommendations. In October 2021, the Group of 77 (G77), representing over 130 developing countries, tabled a resolution at the UN General Assembly that included the creation of an intergovernmental UN tax body. The proposal faced opposition from some OECD countries and was not adopted, but the G77 has since continued to stress this demand. Furthermore, the Africa Group has continued its call for a comprehensive UN Tax Convention.

Throughout 2021, Eurodad worked on producing a proposal for how such a UN Tax Convention could be designed, building on examples from existing UN conventions and linking global tax policy issues to existing global goals and commitments such as the sustainable development goals, environmental protection, human rights and the fight against inequalities, including gender inequalities. The proposal was set to be published jointly with the Global Alliance for Tax Justice in March 2022.

At the EU level, Eurodad continued to work closely with members and allies to push for increased transparency and action against harmful tax practices in the EU. At the end of 2021, the EU formally adopted new rules on public country by country reporting, over five years after the European Commission published its original proposal for a directive.

Throughout this period, Eurodad coordinated a strong civil society push in favour of full public country by country reporting that would allow citizens to see where multinational corporations are doing business and how much tax they pay in each country where they operate. In 2021, this work included joint letters to the European Parliament and Member States calling for an ambitious outcome of the negotiations. However, since the compromise outcome of the EU negotiations only introduces transparency for some countries but not for others, Eurodad also worked with members and allies to highlight the inadequacy of the new EU rules and the need for more ambitious EU action in the future. The campaign for further progress continues into 2022, together with a push for strengthening the EU's measures against anonymous owners of companies and trusts.

In 2021, Eurodad also started exploring options for policies that combine progressive taxation and environmental protection with a view to scaling up the work in 2022.

debt justice

“ The collaboration with Eurodad has allowed ACEP to strengthen its advocacy work in the field of finance for development. The training sessions promoted by Eurodad as well the monthly debt calls helped to build a deeper understanding of debt issues by strengthening ACEP’s capacity in this theme. The project allowed us to disseminate important international debates in Portuguese. ACEP has worked as an intermediary between Eurodad and our partners in African Portuguese Speaking Countries and we intend to maintain the link with the network.”

Rita Cavaco

ACEP – Associação Para a
Cooperação Entre os Povos

Launched cross-CSO campaign on the links between the debt and climate crises that engaged thousands on social media. The issue was then discussed at COP26

Eurodad-led advocacy work calling for debt architecture reform at the UN helps secure participation of European and global leaders

Improvements made to the OECD’s debt transparency initiative following CSO pressure coordinated by Eurodad, and the publication of an influential report on sovereign bonds

Continued to strengthen the debt justice movement through capacity-building and coordination

A combination of health, economic and social crises has had devastating consequences on the global debt landscape, making Eurodad's work, and the work of its partners, crucial. Joint advocacy continued to be critical in ensuring that the sovereign debt crisis would not drop off the agenda as a priority for the international community. Eurodad's debt team focused on increasing the capacity of CSOs on the one hand, while intensifying coordinated advocacy and campaigning on the other.

Influential research, including on debt transparency

During the year, the team produced a number of pieces of influential research and analyses on issues including the lack of transparency around debt and creditors. **"Sleep Now in the Fire: Sovereign Bonds and the Covid-19 debt crisis"**, was a particularly impactful report on debt transparency, and was published in the context of the OECD's proposal on a Debt Transparency Initiative (DTI). The report shed light on the exposure of indebted countries to financial markets and the measures needed to improve transparency on sovereign bonds and ensure private creditor participation in debt relief. This report – which attracted media coverage throughout the year – was quickly followed by an **open letter**, signed by 67 CSOs and networks and sent by Eurodad to the OECD, the European Commission and the Presidency of the European Council. It again outlined the need for a more ambitious and comprehensive approach to debt transparency. Following this coordinated advocacy work, several improvements were made to the original design of the OECD DTI.

Other influential publications in 2021 included **"Dam debt: Understanding the dynamics of Suriname's debt crisis"**, which led to meetings with officials on this issue. The piece **"A Guide to IMF surcharges"** also played an important supportive role in CSO advocacy on an issue that would go on to become very politically contentious in 2022.

Eurodad's debt team also published a series of country-specific infographics on **Belize, Kenya, Colombia** and **Suriname**. This format was very well received by our audiences, and complemented related reports.

FfD and the campaign for the reform of sovereign debt architecture

Global advocacy calling for sovereign debt architecture reform through the UN's Financing for Development (FfD) process was another central pillar of our work in 2021. Together with regional debt networks, local CSOs and the Civil Society Group on FfD, we co-convened a campaign around the UN high level event (HLE) on Debt Architecture and Liquidity in March 2021. This campaign ensured that civil society views were heard both ahead of and during the HLE and included the production of a toolkit for CSOs and a Civil Society meeting on Debt Architecture that Eurodad co-organised ahead of the HLE. This event was attended by the UN Deputy Secretary General, the Permanent Representatives of Canada and Jamaica and the President of ECOSOC.

Eurodad also produced a template advocacy letter to secure high level participation from countries and European institutions in the HLE, as well as to share CSOs calls. Eurodad sent this letter to several countries and to the EC president, Ursula Von der Leyen, who then participated.

We also supported civil society from across the world, participating in the FfD Forum and producing a joint **"Civil Society FfD Group's Response to Final 2021 FfD Outcome Document"**. Eurodad participated in the High Level Political Forum (HLPF) event "Road to 75th UN General Assembly: FfD Systemic Governance Reforms on Trade, Tax and Debt to Advance the 2030 Agenda" and attended the HLPF event "Financing a sustainable recovery: The role of debt-relief instruments webinar", maintaining momentum amongst CSOs and pressure on decision-makers.

Eurodad also continued to advocate towards other key international fora where sovereign debt was discussed. We co-organised one side event at the IMF-World Bank Annual meetings on IMF Surcharges and actively participated in virtual advocacy meetings with IMF staff and European Executive Directors both during the Spring and Annual meetings, and throughout the year. In total, the Eurodad debt team maintained its presence despite the pandemic, taking part in 59 virtual advocacy meetings and events with officials from UN agencies and bodies, IMF, European Commission, OECD, national governments and others.

Strengthening the debt movement

During this second year under pandemic conditions, Eurodad also doubled down on its capacity-building work for CSOs. In early 2021, we launched a highly popular seven-session training series, titled "**Debt Wednesdays: understanding debt today**", co-convened by AFRODAD, LATINDADD, APMDD and Jubilee USA. These sessions provided both basic and specific knowledge on sovereign debt to activists and CSOs. Twenty-seven international experts from four continents, both from civil society and academia, participated as speakers with 335 participants from all over the world attending one or more sessions. Participants expressed very positive feedback through the evaluation survey shared with them after the training series and this model is subsequently being adapted by other teams.

We also produced publications such as "**How to get to the bottom of a country's debts?**", a briefing on debt audits to support CSOs and government officials by providing ideas about how to initiate this kind of process. Eurodad's role in strengthening the debt movement also involved continued coordination, including a strategy session in March to review the Theory of Change of the global debt movement, and a second to discuss forthcoming plans and expectations on the evolution of the sovereign debt vulnerabilities and policies.

Launching a campaign on the debt and climate crises

From October, Eurodad's Q&A report "**The Climate Emergency: What's debt got to do with it?**" provided information for activists and social movements working on climate, debt and global economic and environmental justice.

This was followed up in October when Eurodad took the lead role in a coalition of CSOs that launched a campaign on the undeniable links between the climate and debt crises. This engaged climate activists and movements for them to support CSOs' calls on debt relief and debt-free climate finance. The campaign statement was signed by more than 240 organisations from all over the world. In October, Eurodad organised a Twitter storm, including the launch of an explainer film, under the hashtag #ClimateDebtJustice, which was used by more than 1,800 people on social media. Approximately 3,800 people engaged with the conversation (likes, retweets and replies), with a total potential reach of about 9 million people, according to analysis by the Global Strategic Communications Council (GSCC). A couple of weeks afterwards, those messages were taken to COP26. The debt team intends to continue campaigning upon this important issue in 2022.

“ The partnership with Eurodad has been, and continues to be, very fruitful for us as a coalition that represents grassroots organisations in the global south, particularly in the Middle East and North Africa. This is not only in terms of the knowledge and research that they produce and we use to build our advocacy campaigns and work, but also because of their keen interest in the representation of civil society from the global south, amplifying their voices. Over the previous period we have developed working methods, and contributed to building alliances and campaigns addressing debt justice and [campaigning against] austerity that would not have taken place without the efforts of our partners and colleagues at Eurodad.”

Shareen Talat
Co-Director MENA, Arab Watch Coalition

The World Bank's Doing Business Report came to an end, following more than a decade of campaigning by Eurodad and fellow CSOs

Coordination of CSO advocacy delayed rich countries' plans to report excess Covid-19 vaccines as aid

Broad CSO advocacy work calling for Special Drawing Rights to reach those that need them most

Movement for quality public services gathers momentum

Forging stronger links between development and climate activists ahead of COP26

During 2021, as the Covid-19 pandemic continued to hit the world's poorest and marginalised the hardest, Eurodad's Development Finance Team monitored the way institutions like the World Bank and IMF, and donor governments responded. Eurodad followed the multifaceted crises that emerged from the pandemic, and advocated for policies and practices that put people and planet first. It was a year in which we were a leading force in different CSO coalitions, contributing to make landmark decisions by international financial institutions possible. It was also a year that opened new opportunities (and challenges) in 2022 and beyond.

Advocating for fair distribution of Special Drawing Rights

2021 was the year that the IMF announced its largest ever allocation of Special Drawing Rights (SDRs), a global reserve currency created to supplement official reserves. Earlier in the year, Eurodad had played an instrumental role in pulling together a statement signed by **220 organisations urging the G20 finance ministers** to back a new round of SDRs – a critical instrument to increase developing countries' much needed fiscal space to respond to the crisis. Unfortunately, the final allocation was distributed in an unfair way, based on IMF quotas, so that wealthy countries that did not need SDRs still received a greater portion than low-income nations. Again, Eurodad joined 280 CSOs and academics with **a letter** calling on wealthy countries to redistribute their SDRs to help vulnerable nations cope with the Covid-19 crisis, the inequality crisis and the climate crisis.

The September letter outlined the key principles for the rechanneling of SDRs, which have been discussed in several meetings with decision makers, including with European Executive Directors at the IMF. In 2022 Eurodad continues advocating for the rechanneling of SDRs from developed to developing countries, and for the IMF and others to establish the appropriate instruments to distribute them.

Influencing World Bank policies and practices

In September 2021 Eurodad and civil society partners across the world breathed a collective sigh of relief when the World Bank announced the end of its controversial Doing Business Report and Rankings. This followed years of advocacy and campaign work in which CSOs called out the report for its flawed methodology, inherent biases and for the harmful impact of the policy reforms it advocated. The **report was cancelled** when revelations emerged of irregularities and manipulation of its data. In March 2021 pressure had mounted on the Bank when, as part of the larger "Rights not Ranking" campaign, **300 CSOs** and academics from around the world, including Eurodad, published a **joint letter** calling on the Executive Directors to end the publication of the DB report. Following the World Bank announcement, Eurodad coordinated a **statement** sent to Bank management and Board demanding "root and branch reforms to restore the World Bank's credibility and legitimacy", which got the support of more than 140 CSOs and academics. The possibility of a "Doing Business Report 2.0", under the title Business Enabling Environment (BEE) project, continued to be closely monitored into 2022.

Eurodad's work also resulted in highly visible and impactful actions at the time of the **20th replenishment of the World Bank's International Development Association (IDA)**, which provides finance to low-income countries. Eurodad's engagement in the IDA20 process was critical in convening partners around a shared agenda and in drawing attention to the lack of development additionality of the IDA's Private Sector Window (PSW). Eurodad's co-authored piece **A wrong turn for World Bank concessional lending**, first published on Project Syndicate, was re-published eight times with a combined reach of more than 500,000 views, making it the one of the most impactful of Eurodad's written outputs in 2021. The fact that the PSW maintained its size was a great victory for Eurodad, as we strongly argued against an increase in the size of this window on the basis of the poor evidence base of its development impact. In December, Eurodad coordinated a **joint CSO statement** criticising the lack of proper civil society engagement in the IDA20, which attracted the support of 18 organisations from the global north and south. This action was successful in triggering a response from the World Bank, and resulted in a follow-up meeting in early February 2022.

In 2021 Eurodad's research also exposed the fact that the World Bank's response to the crisis continued to fall short, relying on previous flawed approaches that favoured private finance. In April, Eurodad published the briefing paper **Rebuilding better, but for whom?**, which contributed to shape CSO analysis on the issue. Towards the end of September, Eurodad launched the report **The Policy Lending Doctrine: Development Policy Financing in the World Bank's Covid-19 response**. This looked at the budget support provided to developing country governments, which have conditions attached requiring the adoption of specific policy and regulatory reforms. The report called for a Development Policy Financing (DPF) Retrospective to assess this approach in light of the Bank's core commitment to eradicate poverty and enhance shared prosperity. The report triggered a timely discussion on the issue of conditionality, including at a joint event at the October IMF/WB Civil Society Policy Forum. In November the Bank finally announced the consultation on the first draft of the 2021 DPF Retrospective, which had been postponed for two years. Eurodad co-drafted a **joint submission**, which attracted the support of 14 CSOs. It highlighted superficial engagement with civil society during the consultation and the continued problematic use of policy conditionality. As the economic and social crisis is far from being over, in 2022 Eurodad and partners will continue monitoring the use of DPF.

Reclaiming public development banks

Building on Eurodad's longstanding work to reclaim public development banks, in November 2021 Eurodad monitored discussions at the Second Finance in Common Summit. Our **analysis** indicates that most of these institutions still promote a problematic private finance first approach to development that risks undermining progress towards the Agenda 2030 and the Paris Agreement. In 2022 Eurodad will continue its work in this area with the aim of shaping the recently established EIB's development branch, named 'EIB Global'.

Continuing to advocate for decision-makers to put people before profit

In 2021 Eurodad continued to expose the harmful impact of the promotion of market-based approaches, including public private partnerships (PPPs), for the delivery of infrastructure and public services across international financial institutions, while working to reclaim infrastructure and public services. In October, Eurodad launched its new joint report **Reclaiming sustainable infrastructure as a public good** at an event co-organised with partners at the Civil20 (C20) Summit – a relevant opportunity to engage the Italian presidency of the G20 in a dialogue on infrastructure financing. The report is accompanied by a rich collection of case studies developed by an international group of partners and Eurodad members. Since then, the report and its case studies have been widely disseminated with great impact on social media. In 2022 Eurodad will continue its work on this issue by scrutinising the European Union's Global Gateway plan.

A Global Manifesto for Public Services was also launched in October through an **event** that brought together nine international human rights experts and was attended by over 500 people. This landmark text, signed by 200 organisations, was developed collectively and the process was coordinated by a facilitation group of nine CSOs, including Eurodad. The manifesto advances a series of 10 principles for universal quality public services in the 21st century and outlines how funding universal quality public services is possible. In 2022 Eurodad and partners' work in this field will continue targeting IFI policies and practices, and broadening CSO alliances in preparation of a major gathering in November 2022

Monitoring the quality and quantity of aid during the Covid-19 crisis

Eurodad continued its leadership role in CSO engagement with the OECD's Development Assistance Committee (DAC), through its CSO Reference Group, maintaining the pressure for better quality aid. In April, Eurodad **coordinated civil society's response** to the DAC's publication of preliminary official development assistance (ODA) figures for 2020 – a critical year in light of the Covid-19 pandemic. The statement – which called for DAC members to urgently meet their commitments on both quantity and quality of aid – got the support of 76 CSOs from across the world and was quoted by **Devex**.

Moreover, in 2021 Eurodad coordinated several CSO actions that were very influential in the highly controversial DAC discussion on how to count the donation of excess Covid-19 vaccines as ODA. In October a CSO statement to the DAC expressing outrage about these plans, and accompanying press statements, were quoted in the media. A joint **letter to the OECD** was also sent in December with the support of 28 CSOs. Divisions within the DAC membership quickly became clear. This, combined with the outcry from CSOs, helped to prevent **any quick decisions** from being made in 2021.

Eurodad's research was also critical to expose the increasing use of private sector instruments in the reporting of ODA, and the challenges that this brings for an agenda focused on aid quality. In February Eurodad released the report '**Time for action: How private sector instruments are undermining aid budgets**', which raised the profile of this issue and called for an external review of the whole ODA modernisation process and its impact on the quantity and quality of aid. The main messages of the report have been widely disseminated, including during the **2021 OECD Blended Finance and Impact week** and several civil society sessions. Later in the year, Eurodad published the '**Strings still attached: Unmet commitments on tied aid**', which shed light on the issue of tied aid. In 2022 Eurodad's work on this issue will continue to be of high priority, at a time when it is key to defend aid budgets for the benefit of countries and peoples most in need.

Forging stronger links between the climate and development finance communities

"We are really grateful for Eurodad's coordination of meetings and advocacy opportunities, and your consistent information sharing which was so helpful in following developments. It made such a difference to our COP26 experience (especially as this was the first COP many of us had attended) and meant that we all learned a huge amount about the inner workings of the UNFCCC processes and enabled us to engage in more advocacy opportunities than we were expecting."

Heidi Chow

Executive Director, Jubilee Debt Campaign

In 2021, climate change adaptation and mitigation were central in post-pandemic recovery discussions and the organisation of COP26 in the UK. Eurodad's research and analysis, together with new relationships built with important actors, such as the Climate Action Network and the Global Strategic Communications Council (GSCC), contributed to highly influential actions in a critical year.

Eurodad provided inputs for multiple CSO actions to urge institutions to tackle climate change and develop sustainably, in a post Covid-19 context. This included **a letter** to the convening nations for the Petersberg Climate Dialogue, and active engagement with the COP26 Presidency. Furthermore, Eurodad contributed to a **letter to the European Investment Bank (EIB)** asking Finance Ministers "to transform the EIB into a public bank that works for everyone" as well as a **letter on the review process of the Environmental and Social Sustainability Framework (ESSF)**. Eurodad's work on the latter also included **a briefing** that outlined recommendations on how the European Investment Bank should address the interconnected issue of gender inequity and the climate crisis in the newly proposed policy.

Moreover, in an effort to forge stronger links between the development finance and climate finance advocacy communities, Eurodad published the briefing **How lessons from development finance can strengthen climate finance** which was presented on panels featuring policy-makers. In order to build capacity and support coordinated CSO advocacy during COP26, Eurodad launched the toolkit **Skilling up to Scale up: A guide to COP26 for development finance organisations** that provided an overview of COP processes and provided suggestions about how to engage in COP26. In 2022 Eurodad's work to scale up the capacity of members and partners to engage in climate finance discussions continues.

gender task force

“ Eurodad is one of Equidad de Género’s greatest allies when it comes to fighting for Global Democratic Governance and structural transformation. Every year that passes by, we get to work closer and closer towards common aims. We recognize the feminist aspirations of our colleagues working in different areas of Eurodad, and we have witnessed the organization becoming stronger because of that as well.”

Emilia Reyes

Program Director at Equidad de Género:
Ciudadanía, Trabajo y Familia

Eurodad continued to integrate a gender justice perspective into its work, consolidating strong relationships with feminist organisations and movements.

In 2021, Eurodad prioritised outreach to members and allies who are engaged in the feminist and women’s rights movements, which has led to new alliances with FEMNET, WOMIN and Nawi (Afrifem Macroeconomics Collective) and the Women’s Environment and Development Organisation (WEDO). This work continued in parallel with our ongoing cooperation with existing members and allies including the tax and gender working group within the Global Alliance for Tax Justice, the Women’s Working Group on FfD (WWG on FfD), Equidad de Género, Bretton Woods Project, the European Women’s Lobby, and Womankind Worldwide.

In 2021 gender justice was regularly mainstreamed throughout Eurodad’s policy areas, with space for dedicated analysis, especially in relation to other cross-cutting issues such as climate.

Eurodad’s engagement on the topic clearly increased in terms of specific written outputs and actions, such as the blog series on Covid-19 from a feminist perspective, published to coincide with International Women’s Day and in anticipation of the UN’s 65th session of the Commission on the Status of Women (CSW65), to which we also participated as an active actor. This approach is also evident in the **written reflection** on the duality of gender and climate in the European Investment Bank (EIB), which resulted in the EIB including some of our recommendations on the definition of gender. Likewise, in an expert seminar organised during the Eurodad Policy Forum 2021, each speaker brought a unique and complementary analysis, challenging Eurodad and our members to carefully think about our approach to working together with the feminist and women’s rights movement.

Eurodad continued its engagement in public campaigns highlighting the linkages between gender and economic justice, such as International Women’s Day, 16 Days of Activism Against Gender Based Violence and the annual ‘Make Taxes Work for Women’ global days of action.

The work carried out in the last two years is paying off with external recognition. For example, in 2021 Eurodad’s gender justice work has been quoted in the **IPCC’s Sixth Assessment Report** segment on Gender, Climate Justice and Transformative Pathways.

Communicating our work

Covid-19 restrictions continued to impact on our communications work in 2021, though the systems developed in the previous year allowed us to meet most of our annual objectives and respond to opportunities.

Throughout the year, Eurodad produced and disseminated 17 reports and briefings, 27 blogs, contributed to 42 news and analysis articles and open letters, and distributed 24 press releases.

We started the year with an updated Communications Strategy in line with our five-year organisational strategy. We continued to build on our vital digital communications capacity, adding a Communications Officer to our team in October, with specific responsibilities for our website and contact records system. We also strengthened our planning and monitoring systems.

We continued to improve our website, tailoring our products to our audience's needs. We introduced easy 'register buttons' for our events so that we could include external events more easily. This whole section is now more user-friendly. Monitoring and evaluating our impact is also crucial to ensuring our external communications remain relevant and well-read. We worked on providing better analytics on our website in 2021 to ensure we provide useful and engaging information that our audiences respond well to.

We also worked on improving the quality of our biweekly newsletter, striving to include the most up-to-the-minute content from the world of development finance, particularly in light of the fast-moving nature of the Covid-19 crisis. We bunched content according to the theme we are covering, presenting readers with a neat package on a particular topic and making it as reader-friendly as possible. We saw readership grow by 600 over the year. Our open rate also remained very high at 36.5 percent. We had 1,838 readers by December.

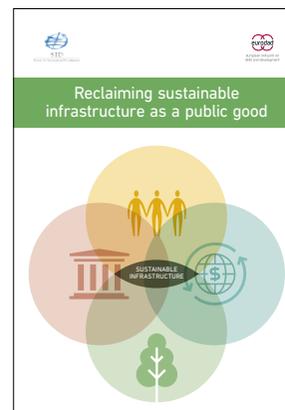
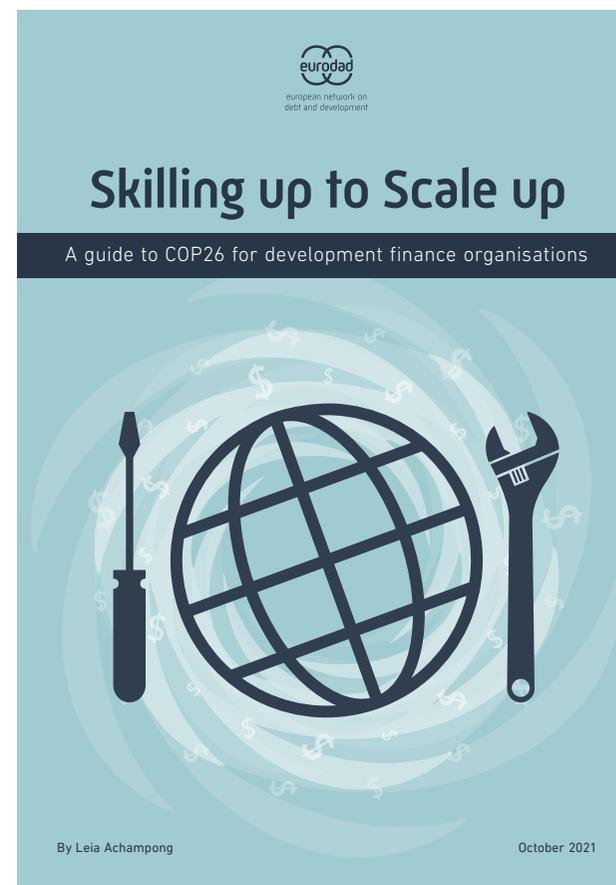
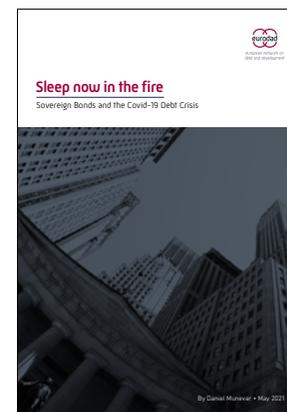
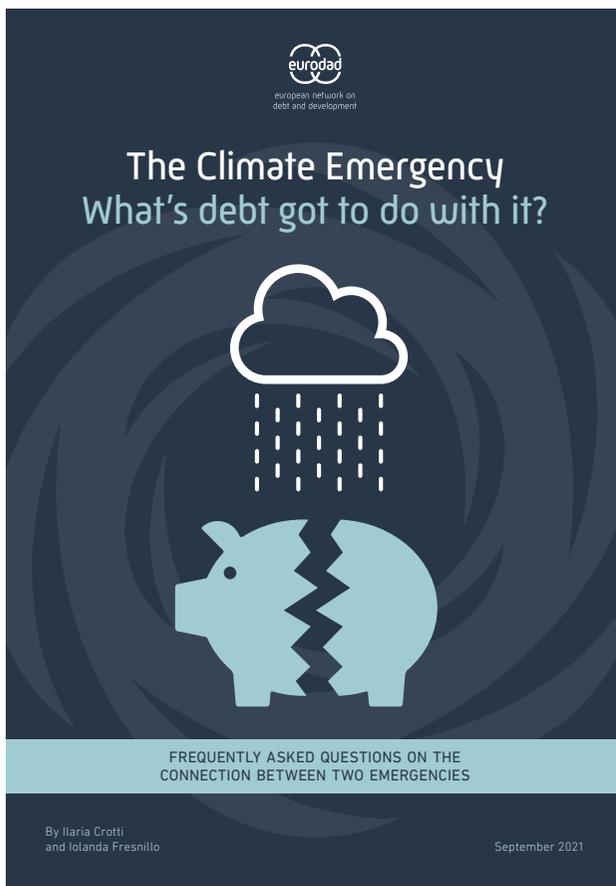
During 2021, Eurodad continued to improve our use of social media, with a focus on Twitter. We became more systematic regarding how we promoted our outputs or events on Twitter, Facebook and LinkedIn, developing more eye-catching templates, using more threads to give clear messaging and building stronger relationships with our target audiences. **One of our most successful tweets**, in response to the ending of the *Doing Business Report*, generated 32,300 impressions and 142 retweets. Our followers continued to increase. During 2021, Eurodad added 1,000 new followers on Twitter, totalling 7,624 followers by December 2021.

We also increased our coalition work, trialling our first Eurodad-led Twitter Storm on the dual issues of debt and climate justice, #debtclimatejustice. This work was enormously impactful, reaching new audiences such as large swathes of young people. One thousand people were talking about the campaign on day one and the global total reach was 9 million. A short film on the issue was one of our outputs. It attracted more than 1,000 views on day one alone. We also invested more time in our LinkedIn posts, systematising the outputs we promoted on that platform. Our following increased by more than 25 percent as we attracted almost 500 new links throughout the year.

During the year, our policy and advocacy experts also continued to use their own accounts in more sophisticated ways, using infographics and twitter threads to channel Eurodad's messages and create conversations during a period when face-to-face meetings were largely suspended.

Towards the end of the year, our social media specialist undertook a deep dive into our social media platforms and the trends amongst our target audience across all popular social media channels. This will form the basis of a new social media strategy in the early part of 2022.

In 2021 Eurodad's work and views were covered by 250 different media outlets across more than 730 articles. We also continued to strengthen our relationships with key journalists at target outlets like Reuters, Bloomberg, Devex, the Financial Times, Politico, Al Jazeera and many EU-facing and development platforms. More than 115 academic journals and articles cited our work.



Eurodad staff 2021

Antonia Vorner

Head of Operations

Cecilia Gondard

Senior Network Outreach Coordinator

Chiara Mariotti

Senior Policy and Advocacy Officer

Chloe Blave

Operations Officer

Daniel Munevar

Senior Policy and Advocacy Officer

Emy de Nardi

Communications Officer
(from October)

Farwa Sial

Senior Policy and Advocacy Officer
(from June)

Hamdi Benslama

Policy Assistant
(from September)

Hannah Robinson

Administrative and Communication Intern
(from April until September)

Ilaria Crotti

Policy Assistant

Iolanda Fresnillo

Senior Policy and Advocacy Officer
(until July)
Policy and Advocacy Manager
(from August)

Jean Letitia Saldanha

Director

Jerónimo Ruiz Victoria

Senior Operations Officer

Joe Inwood

Communication and Operations Intern
(until March)
Network and Organisational Assistant
(from April)

Julia Ravenscroft

Communications Manager

Kendrah Jespersen

Senior Project Coordinator
(from April)

Leia Achampong

Senior Policy and Advocacy Officer

Lena Hoffmeister

Communications Assistant
(from December)

Lottie Atkin

Communications Assistant
(until August)

Lorenzo Forte

Finance and Administrative Officer

María José Romero

Policy and Advocacy Manager

Mark Perera

Policy and Advocacy Manager
(until June)

Mary Stokes

Senior Communications Officer

Nerea Craviotto

Senior Policy and Advocacy Officer

Océane Blavot

Senior Campaign and Outreach
Coordinator

Olivia Lally

Senior Policy and Advocacy Officer

Sachan Kumar

Senior Finance and HR Officer

Tove Maria Ryding

Policy and Advocacy Manager

Eurodad board members 2021

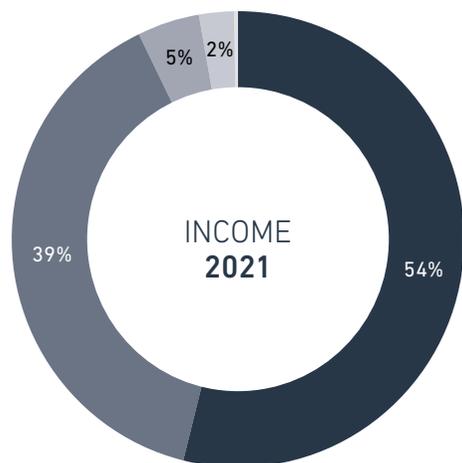
Board member	Organisation	Country	Board role
Hannah Brejnholt Tranberg	<i>Oxfam IBIS</i>	Denmark	Chair
Emma Bürgisser	<i>Bretton Woods Project</i>	United Kingdom	Staff Liaison
Elisabeth Reh binder	<i>CCFD Terre Solidaire</i>	France	
Dominik Gross	<i>Alliance Sud</i>	Switzerland	(from June)
Dr. Farkas István Tamás	<i>Magyar Természetvédők Szövetsége - FoE Hungary</i>	Hungary	
Jürg Staudenmann	<i>Alliance Sud</i>	Switzerland	(until May)
Kristina Rehbein	<i>erlassjahr.de</i>	Germany	Treasurer
Lars Koch	<i>ActionAid</i>	Denmark	
Maruša Babnik	<i>Ekvilib Institut</i>	Slovenia	
Matti Tapani Kohonen	<i>Christianaid</i>	United Kingdom	(until April)
Penny Davies	<i>Diakonia</i>	Sweden	

financial overview

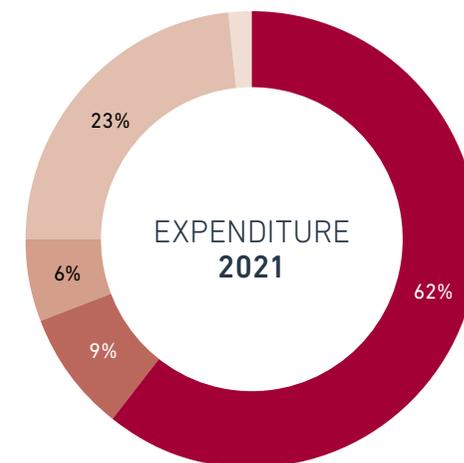
Eurodad's financial year begins on 1 January and ends on 31 December. The 2021 financial statements were audited by an external auditor, [Laurent Van der Linden, RSM Belgium](#), in accordance with the financial reporting framework applicable in Belgium. The 2021 accounts will be available online on the [National Bank of Belgium website](#) once they have been approved by the General Assembly of Members in June 2021. A copy of the Auditor's report will also be available on Eurodad's website [here](#).

Eurodad is grateful for the support from all its network members and our funders who have made it possible to carry out the work presented in this report. As advocates for transparency and public access to information, Eurodad discloses additional financial information beyond what is legally required, including a detailed overview of grant income by donor and grant purpose. The result for 2021 amounted to 187,162 which will go towards increasing the organisation's sustainability reserves. It is Eurodad's policy to continue building up its reserves until it holds six months' operational costs in reserve.

All amounts presented in the tables and charts that follow are in Euros and have been rounded to the closest unit.



- Public donors **€1,758,307**
- Private donors **€1,266,601**
- Membership contributions **€148,547**
- Other income **€75,912**
- Consultancy fees **€8,267**



- Human resources **€1,865,905**
- Running costs **€259,412**
- Publications, events & travel **€183,526**
- Partner expenses **€710,884**
- Other expenses **€50,744**

Income from grants

	2021 grant	Time period	Lead Partner	Purpose
Income from grants	2,940,184			
Public	1,758,307			
European Commission - DG INTPA FPA Umbrella	1,230,679	2018-2022	Eurodad	<i>Strengthening Regional, European and Global CSO Umbrella Organisations</i>
European Commission - DG INTPA EC DRM	327,231	2020-2023	Eurodad	<i>From commitments to actions: Increasing public accountability in the lead up to Monterrey + 20</i>
European Commission - DG INTPA EC Inequalities	138,854	2021-2024	Eurodad	<i>Raising the voices of communities on the front-line in the fight against economic inequalities</i>
Norad - Norwegian Agency for Development Cooperation	61,544	2017-2020	Afrodad	<i>Stronger civil society advocacy to motivate decision-makers to take action on illicit financial flows, transparency, tax justice and domestic resource mobilization</i>
Private	1,181,877			
Bill and Melinda Gates Foundation	510,079	2018-2021	Eurodad	<i>Research and Analysis: Effective Aid & Publicly backed Private Finance</i>
Brot für die Welt - Evangelischer Entwicklungsdienst*	64,956	2018-2020	Eurodad	<i>CSO coordination to influence the UN's Financing for Development summit and its implementation</i>
Financial Transparency Coalition	76,843	2020-2021	FTC	<i>Support for Country by Beneficial Ownership, Country by Country Reporting & International Institutional Architecture Programmes</i>
Open Society Institute (OSI)	177,655	2020-2021	Eurodad	<i>General Support Grant</i>
Foundation to Promote Open Society (FPOS)	65,191	2020-2022	Eurodad	<i>Support research, mobilization, and action on the Caribbean region's Covid-19 policy responses to ensure a focus on long term debt sustainability and oversight</i>
Foundation to Promote Open Society (FPOS)	152,600	2020-2021	Eurodad	<i>Support for programme on impact of international economics institutions on health</i>
Misereor - Bischöfliches Hilfswerk	15,881	2019-2021	Eurodad	<i>Building and strengthening CSO coalitions for Change on the Role of the Private Sector in Development</i>
C.S. Mott Foundation	85,556	2020-2021	Eurodad	<i>Adressing changes in international development finance</i>
Avina Americas	16,774	2020-2021	Latindadd	<i>Debt Justice in Times of Covid-19 and Multiple Crises</i>
Avina Americas	16,341	2020-2021	APMDD	<i>Scaling up Climate Finance Delivery and Ensuring Climate Action in the Midst of Covid19 and Economic Crisis</i>
Foundation to Promote Open Society (FPOS)	84,725	2021-2022	Eurodad	<i>Strengthening a global, cross-sectoral campaign on public-private partnerships to reclaim public services for a just COVID19 recovery</i>

Income

Income	2021	2020	2019
Unrestricted income	156.814	152,582	172,474
Members contributions	148.547	151,990	148,625
(International) Conference Fees	-	-	9,093
Consultancy fees	8.267	592	14,756
Donations	-	-	-
Income from grants	3.024.909	2,287,911	2,061,390
<i>Public</i>	1.758.307	1,391,081	1,017,787
European Commission – DG INTPA EC Inequalities	138.854		
European Commission – DG DEVCO DEAR	-	181,220	191,088
European Commission – DG INTPA FPA Umbrella	1.230.679	968,530	794,755
European Commission – EC DRM	327.231	218,437	
Norad – Norwegian Agency for Development Cooperation	61.544	22,893	31,944
<i>Private</i>	1.266.601	896,830	1,043,603
Bill and Melinda Gates Foundation	510.079	475,530	617,684
Brot für die Welt – Evangelischer Entwicklungsdienst	64.956	148,482	98,568
C.S. Mott Foundation	85.556	43,398	57,533
Financial Transparency Coalition	76.843	32,085	69,551
Heinrich-Böll-Stiftung	-	2,654	
Open Society Foundations	480.170	185,562	200,267
Misereor	15.881	9,119	
Avina	33,116		
Other income	49.141	40,360	42,134
Cost recovery from third parties	49,141	40,955	41,943
Co-funding from project partners	-	-595	191
Subtotal Operational Income	3,230,864	2,480,853	2,275,998
Financial income	49	19	199
Exceptional income	1,928	64	7
Adjust Grant advances	24,794	-	-
Total income	3,257,634	2,480,936	2,276,203

Member contributions over €1,000

	2021	2020	2019
Christian Aid	11.725	11.030	11.755
Oxfam Novib	5.000	10.000	10.000
ActionAid International	10.000	10.000	10.000
11.11.11	8.000	8.000	8.000
Alliance Sud	7.500	7.500	7.500
CCFD-Terre Solidaire	7.500	7.500	7.500
Church of Sweden Aid	6.500	6.500	6.500
Oxfam IBIS	6.000	6.000	6.000
Norwegian Church Aid	5.054	4.605	4.996
Both ENDS	5.000	5.000	5.000
Diakonia	5.000	5.000	5.000
Wemos	5.000	5.000	2.500
Oxfam Intermón	4.500	4.500	4.500
CNCD – 11.11.11	4.000	4.000	4.000
Fingo – Finnish Development NGOs	3.700	3.700	3.700
Cercle de Coopération des ONG de développement	2.500	2.500	2.500
Koo Austria	2.500	2.500	2.500
Trócaire	2.500	2.500	2.500
Globalt Fokus	2.500	2.500	N.A
Oxfam Germany	2.000	2.000	2.000
Forum Syd	1.400	1.400	1.400
Norwegian Forum for Development and Environment	1.204	-	1.267
Cafod	1.166	1,108	1091,07



european network on
debt and development

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Contracting Authority: European Commission

**Civil Society and Local Authorities
Strengthening Regional, European and Global CSO
Umbrella Organisations**

Grant Application Form

Budget line: 21.02.08.03

Reference: **EuropeAid/150-053/C/ACT/Multi**

PART B. GRANT APPLICATION FORM

Only to be completed by applicants who receive an invitation to submit an action Grant Application form

1 THE GRANT APPLICATION FORM

The Grant Application is composed of :

1. Action Description
2. Data relating to the Applicant,
3. Data relating to the co-applicant(s) of the action which were not part of the original Framework Partnership, and justification of their added value and link to the framework partner.
4. Data relating to their affiliated entity(ies) of the action which were not part of the original Framework Partnership
5. Associates of the applicant participating in the action
6. Checklist for the Grant application
7. Declaration by the Applicant for the Grant application
8. Assessment Grid for the Grant application

2 GENERAL INFORMATION

2.1. Summary of the Grant

Reference of the Call for Proposals	EuropeAid/150-053/C/ACT/Multi
Title of the Call for Proposals	Strengthening Regional, European and Global CSO Umbrella Organisations
Name of the applicant	European Network on Debt and Development (Eurodad)
Number of the proposal¹	DCI-NSA/2015/30
Title of the Grant	Strengthening the institutional, operational and representational capacity of the Eurodad network to undertake coordinated actions and advocate for policy changes that help ensure a democratically controlled, environmentally sustainable financial and economic system that works to eradicate poverty and ensure human rights for all.
Coverage of the action <i>-specify country(ies) region(s) that will benefit from the action</i>	<p>Europe: all EU member states, through expansion of the Eurodad network, (currently covers Austria, Belgium, Czech Republic, Denmark, Finland, France, Germany, Hungary, Ireland, Italy, Luxembourg, the Netherlands, Poland, Slovenia, Spain, Sweden, United Kingdom).</p> <p>Other European countries: Norway, Switzerland, through Eurodad members in those countries.</p> <p>Africa: through cooperation with sister network, Afrodad.</p> <p>Asia: through cooperation with sister network, Asian People's Movement on Debt and Development.</p> <p>Latin America: through cooperation with sister network Latindadd.</p>
Number of the Lot	Lot 5 (iii)
Total duration of the action (months):	48 months
EU financing requested (amount)	EUR 4,535,789
EU financing requested as a percentage of total budget of the Action (indicative)	80%

¹ When the Contracting Authority has evaluated the Framework Partnership Application it informs the applicant of the outcome and allocates a proposal number.

2.2 The Action

2.2.1 Relevance of the Action to the FPA

2.2.1.1 Relevance to the objectives/sectors/themes/specific priorities of the call for proposals

In order to achieve the ambitious post-2015 Sustainable Development Goals, it is increasingly important for the voices of the citizens of Europe and the global south to be represented at regional and multilateral level to influence key financial and economic policies. As a direct result of this Action, Eurodad will have maximised its effectiveness in attaining transformative yet specific changes to global and European policies, institutions, rules and structures relating to the global economic and financial system. Through strengthening its operational and institutional capacity and expanding both its membership base and its areas of specialist focus under this Action, Eurodad will capitalise on the coordinated actions undertaken and the coalitions built to influence policy-making on development finance-related topics at a global and EU level.

The Eurodad Strategic Plan sets ambitious goals to help achieve: tax justice to stem the loss of resources in developing countries; ending debt crises that hinder economic progress; effective aid that will transform lives; publicly-backed private finance and investment agreements that accelerate development results; a Green Climate Fund that is responsive to the climate adaptation and mitigation priorities of developing countries; and financial sector rules that promote prosperity and do no harm. Eurodad also has crosscutting priorities of: gender equality; global economic good governance; and responsible finance standards.

The Action will allow the Eurodad secretariat to support the expansion of the issues covered by the network from four (4) to seven (7), and the increase in the number of EU member states covered from 20 to 28, greatly enhancing Eurodad's representational capacity. The Action will deliver key capacity development initiatives from Eurodad's Strategic Plan. These will ensure that Eurodad members have clear and coordinated strategies, and undertake coordinated actions at global, regional and national levels, with strong monitoring, evaluation and learning systems, to influence key decisions of the EU and multilateral organisations, and to build policy, advocacy and communications capacity across the network in order to deliver strategic objectives.

This Action is directly relevant to the two specific objectives of the call for proposals:

- ***Call for proposals, Specific Objective 1:*** *To strengthen the institutional and operational capacities of CSO umbrella organisations for coordinated actions at global, regional and/or national levels.*
- ***Call for proposals, Specific Objective 2:*** *To reinforce the capacities of CSO umbrella organisations for coordinated actions at global, regional and/or national levels to effectively represent their constituencies and to promote the role and responsibilities of their members.*

The specific objective of the Actions is aimed at directly contributing to these:

- ***Action Specific Objective:*** *To strengthen the institutional, operational, and representational capacity of Eurodad, including the role and responsibilities of Eurodad network members for coordinated advocacy at European level on an expanded number of development finance issues, including coordinated national level action across European states, and the capacity of Eurodad to reinforce global coalitions and networks.*

These objectives will be achieved by focusing on delivering four concrete results:

At the centre of the **institutional and operational capacity** of Eurodad for coordinated advocacy at European level is the development and implementation of clear and effective strategies, the target of Result 1:

- *Result 1 (R1) – Joint issue-based strategies, including building necessary capacity of members, are agreed and implemented and help deliver policy change towards Eurodad goals*

Joint strategies are the key to undertaking effective coordinated advocacy at a European level, as they enable Eurodad members to agree common objectives, identify a clear theory of change on how the objectives can be achieved, and allow for action at the national level and at regional and international levels to be coordinated around the common strategy. Only by acting together around a common strategy can Eurodad influence the policy-makers in EU member states that are key to using EU influence to change the policies and practices of the EU and the multilateral organisations that Eurodad targets.² For example, during the last strategy period, Eurodad played a key role in the coalition that persuaded donors at the OECD’s Development Assistance Committee³ to close loopholes to stop them from including profit-making loans as development aid, and ensured that low-income countries will receive more aid as grants in the future.

The Action will develop a new Advocacy Planning Coordination System (work package A1.1).⁴ This will provide guidelines and intensive training at regular strategic planning meetings involving all Eurodad members and other Target Groups of the Action to deliver a step-change upgrade to Eurodad’s methods of developing, agreeing and implementing joint issue-based strategies within the network and broader coalitions. During the Action, at least 710 Target Group participants from at least 140 Target Group organisations will have their capacity built as a result of this work package.

By bringing together best practices from across the network into a simple user-friendly web portal – and using this as the basis for training and to model collective actions – a Policy, Advocacy and Communications Toolkit (work package A1.2) will help to improve the effective implementation of common strategies, to make sure they deliver the policy changes envisaged in the Strategic Plan. The Toolkit will bring together best practices, and facilitate sharing of knowledge and ideas within and across the network. It will be the basis for trainings that will reach at least 1,125 staff of 120 target organisations. It will also guide 84 ‘model actions’ across Europe that will involve at least 2,940 staff in 180 target organisations. Additionally, in order to create a multiplier effect beyond the immediate targets of this Action, the Toolkit will be publicly available and widely disseminated to other organisations in Europe and beyond.

Finally, guided by research and experts, clear Strategies and Workplans for the three New Issue areas (A1.3)⁵ of climate finance, investment agreements and financial sector rules will be developed. These will allow members and other Target Groups to improve their collective working around common strategies, and build the coalitions necessary to deliver policy change goals. Although several Eurodad members are already working on each issue area, this represents a key opportunity to improve collaboration across European organisations to deliver on advocacy objectives at the multilateral level.

The Eurodad Strategic Plan emphasises the importance of a strong, experienced and knowledgeable secretariat, and mandates expansion into new issue areas only when additional staff capacity is achieved. Strengthening the secretariat is therefore the focus on one of the results of this Action:

- *Result 4 (R4)⁶ – The Eurodad secretariat expands to planned size, maintaining a highly motivated, experienced team delivering results and effectively supporting the network*

² These include: the World Bank Group; the IMF; the OECD; and the United Nations.

³ This body sets the global rules for what can be counted as Official Development Assistance (ODA, or ‘aid’).

⁴ Please note: in the Eurodad Strategic Plan, this is called a Strategic Planning Coordination System. This has been renamed to avoid confusion as (a) the new name better describes the work package and (b) in recognition that having a work package with the words ‘Strategic Planning’ in it may cause confusion with Eurodad’s own Strategic Plan.

⁵ From now on, numbers in brackets refer to work packages or activities, which are listed in the logframe, and indicative plan.

⁶ Result 4 is discussed second in this section, as it relates most closely to specific objective 1. However it is covered in its logical position – fourth – in the rest of the document, as this makes more sense from the perspective of project management of the Action.

This Action will allow the secretariat to expand to the size envisaged by the Strategic Plan through Recruitment of New Staff (A4.1). This will allow it to implement effectively all of the capacity development initiatives foreseen in the Strategic Plan, which are designed to strengthen Eurodad and members' capacity for coordinated advocacy at European level and within global coalitions. It will also put in place the capacity and systems to significantly increase Eurodad's fundraising capacity, to ensure that the funding from the Action is replaced by a diverse set of other sources by the end of the Action, ensuring financial sustainability.

In addition, Eurodad recognises that effective Planning and Evaluations (A4.2) are vital for achieving all the results of the Action. Upgrading Eurodad's existing Monitoring, Evaluation and Learning (MEL) Framework will ensure that accountability and learning are maximised and that MEL capacity is strengthened, both within Eurodad and among the targets of the Action.

Finally, by strengthening Eurodad's Fundraising Pipeline Planning System (A4.3), the Action will allow the higher level of resources demanded by the Strategic Plan to be maintained, and ensure the long-term sustainability of the Action, by gradually replacing the funding supplied by the Action with alternative sources.

Eurodad's Strategic Plan recognises that the **representational capacity** of the Eurodad network is weakened because it does not cover all EU member states. Solving this problem is the focus of Result 2 of the Action:

- *Result 2 (R2) – The reach of the Eurodad network is extended to include members in all EU member states*

Expanding membership to include all EU member states will greatly strengthen Eurodad and members' capacity for coordinated advocacy at a European level. It means coordinated actions can influence all EU member states, improving Eurodad's ability to influence policy-makers, particularly the European Council. Eurodad will have access to a wider membership and can translate this additional representational capacity into action to influence the majority of member states required within the EU to change policies. It also widens the scope of MEPs that Eurodad can work with, as well as enhancing the representational capacity of the network to make it an even more credible interlocutor with the European Commission, and with the other multilateral organisations that Eurodad aims to influence, such as the World Bank Group, the International Monetary Fund (IMF) and the Organisation for Economic Cooperation and Development (OECD).

A Communications Outreach Plan (A2.1) will lead to the production of high-quality awareness-raising and outreach material and its targeting at organisations, particularly those in the 'missing' EU member states. This will greatly increase awareness of Eurodad's work, and pave the way to participation in Eurodad's coordinated activities, building the strong connections that are a precursor to membership.

A New Members Recruitment Plan (A2.2) will draw on existing networks and members with strong connections to target organisations in the eleven EU member states where Eurodad does not currently have a presence.⁷ The aim will be to build connections and convert these connections into membership through targeted capacity development programmes and involving the organisations in Eurodad work, including the other capacity development initiatives of this Action. In addition, secondary targets will include strengthening the membership base in the two Central and Eastern European (CEE) countries with only one existing member,⁸ and beginning to work with organisations in the four EU candidate countries with no current Eurodad member.⁹ A lack of resources to devote to strategically building connections to new potential members contributed to a decline in membership numbers during the last strategy period, which will be rectified by this Action.

⁷ Bulgaria, Croatia, Latvia, Malta, Cyprus, Greece, Portugal, Romania, Lithuania, Estonia, Slovakia.

⁸ Slovenia, Poland. (Finland, Luxembourg and Austria are not a focus as the single members in those two states are themselves umbrella organisations). Italy and Denmark have one Eurodad member, but also have active ActionAid affiliates, which participate in Eurodad through the membership of ActionAid International.

⁹ Albania, Republic of Macedonia, Montenegro, and Turkey.

In addition, the strengthening of collective strategies through the Advocacy Planning Coordination System (A1.1), and of effective implementation through the Policy, Advocacy and Communications Toolkit (A1.2) (highlighted above) will give target organisations opportunities for training and capacity development, leading to concrete advocacy results, proving the usefulness of being part of the Eurodad network. A major plank of Eurodad's attractiveness for members is its strong track record of success. For example, during the last strategy period, Eurodad was a central part of the civil society organisation (CSO) coalition that successfully lobbied for new anti-money laundering rules in the EU that will require registries of the real owners of companies and other corporate structures.

The addition of three new issues to Eurodad's focus (A1.3) will also increase the number of entry points for new members. The integration of European strategies with those of global networks and coalitions (A3.1 and A3.2) will be an additional attraction for new Eurodad members. The strengthened secretariat (A4.1, A4.2 and A4.3) will be able to provide the high level of support that new members may need in their first engagements with the network.

- *R3 – Effective global coalitions with joint strategies deliver results (policy change objectives) in at least two Eurodad issue areas*

The multilateral organisations that the Eurodad network targets, such as the IMF or the OECD, cannot normally be influenced by European policy-makers alone: pressure must also be brought to bear on governments around the world. This is why strengthening Eurodad's influence at the global level is an important part of strengthening its representational capacity, and this can be best achieved by strengthening ties with global coalitions, the focus of Result 3.

Again, the key for effective civil society organisation (CSO) influence is to share a common strategy within a global coalition, which allows for the coordination and targeting of joint influencing activities, as well as ensuring that national and regional level influencing focuses on achieving shared objectives. Using these strategies to deliver change in two issue areas will both *be a result* of Eurodad's capacity to reinforce global coalitions, and will also *result in* improved capacity, as lessons are learned for the other issue areas that the Eurodad network focuses on.

Through this Action, Eurodad will undertake Joint Strategy Development with Global Partners (A3.1) in a collaborative, egalitarian manner, starting with two active networks that have already developed strategies¹⁰ and within which Eurodad plays a central role. In addition, Eurodad will support Organisational Development Support for its three sister Debt and Development (DAD) networks¹¹ (A3.2) that are associates to this Action, to build their capacity, recognising the key role they play in many of the global coalitions through which Eurodad delivers change towards its Strategic Plan objectives. Eurodad will include these global partners in the capacity development initiatives to improve strategic planning (A1.1) backed by effective policy, advocacy and communications activities (A1.2) as a means of strengthening ties, and helping to ensure that collective effectiveness in delivering advocacy results is strengthened.

¹⁰ Global Alliance for Tax Justice and Reality of Aid.

¹¹ Afrodad, Latindadd, Asian Peoples' Movement on Debt and Development (AMDD)

2.2.1.2 Relevance to the particular needs and constraints of the target country/countries, region(s) and/or relevant sectors (including synergy with other EU initiatives and avoidance of duplication)

Analysis of the problems to be addressed by the action

The following is a list of interrelated problems addressed directly by the Action – i.e. those that are hindering the institutional, operational and representational ability of Eurodad “for coordinated advocacy at European level on an expanded number of development finance issues, including coordinated national level action across European states, and the capacity of Eurodad to reinforce global coalitions and networks”.

A number of factors directly affect Eurodad’s representational capacity:

i. *Hard to achieve change alone*

Individual CSOs with limited resources and poor connections to CSOs in other countries and regions struggle to make their voices heard and to have their needs addressed in regional and global debates. There is a need to work as part of a European coalition to influence the EU’s position within multilaterals. For example, in the 2015 Financing for Development Negotiations (and in all other United Nations forums) – where Eurodad coordinated European CSO activity and drafted the joint position paper of over 140 CSOs from around the globe¹² – the EU negotiated as a single entity. At the moment, Eurodad is present in 18 EU member states, meaning that its ability to coordinate activity in forums such as this is hindered. This is why the Action targets finding active members in all EU member states, strengthening its presence in countries with only one member, and making connections in EU candidate countries (A2.2). The EU does not influence multilaterals alone, which is why Eurodad has to work as part of a global coalition to influence multilaterals. This is why Eurodad’s ability to work as part of global coalitions and networks will need to be strengthened by this Action (A3.1 and A3.2). This need to work together is inter-related with the problem of limited resources (see below) – as it is not sufficient to simply have a presence in each EU member state. Eurodad member organisations need to be active and effective, which is why building capacity on strategic advocacy planning (A1.1) and policy, advocacy and communications implementation (A1.2) are core parts of this Action.

ii. *Working in ‘Silos’*

Working on distinct issue areas means that often the network does not learn from other issue areas’ work or benefit from cross-fertilisation of ideas and lessons learned. As the Strategic Plan states, this “risks [Eurodad] missing important opportunities in other issue areas, and can make it difficult to work on opportunities that cut across many issue areas”. The expansion of the number of issue areas of the network from four to seven in the Strategic Plan – supported by this Action (A1.3) – is one response, as it will allow the secretariat to expand its ability to make connections across different issues, and ensure that there are fewer gaps in expertise. However, this is inter-related to the issue of limited resources, explored below. Unless new issues are properly resourced, and there is also an increased capacity to work across several issues, this problem will not be addressed. This is why the expansion of the secretariat (A4.1) includes staff who have a cross-issue remit, particularly the Vice-Director and the Network Development Officer. Work on cross-cutting issues including gender, emphasised in the Strategic Plan, the far greater attention to capacity development and training initiatives (A1.1, A1.2) and the increased attention paid to Monitoring, Evaluation and Learning (A4.2) will also allow more scope for learning across the network.

iii. *Limited resources*

¹² UN Financing for Development negotiations: What outcomes should be agreed in Addis Ababa in 2015?
<http://eurodad.org/files/pdf/5510336e62b84.pdf>

Many members of the Eurodad network, and of the wider Target Group of CSOs, have limited resources. This means they cannot necessarily cover all the important issues covered by the network, or can only do so in a limited way. These limited resources are obviously interrelated with other problems in this section, as for example, they affect the ability of members of the network to make connections between issue areas. Many of the work packages of the Action are important for resolving this problem, as securing additional resources is not just related to fundraising (A4.3) but also to ensuring clear focus and planning (A1.1 and A4.2), to building skills so that more can be achieved with limited resources (A1.2) and to growing the size and skill base of the network as a whole so that collective capacity is increased (A1.3, A2.1).

iv. *Defining clear, transformative objectives can be difficult, particularly when the global economic situation remains fragile and unpredictable*

Eurodad deals with complex, interrelated economic and financial issues. Finding solutions to address these issues and influence policy-makers requires a detailed understanding of each issue, the impacts on development and also on the power dynamics within the institutions that ought to tackle the issue. This is deeply interrelated with the first problem (hard to achieve change alone), as well as with the problem of limited resources. It is why the Action includes a work package to improve the Advocacy Planning Coordination System (A1.1), as this is at the heart of trying to resolve this problem, by sharing understanding and knowledge across the network and with the broader Target Groups to collectively agree priorities and objectives. In addition, a strengthened secretariat with greater issue-based knowledge (A4.1) and a better Monitoring, Evaluation and Learning (MEL) Framework (A4.2) will also be important. Linking with and learning from partners in developing countries (A3.1 and A3.2) is also very important for ensuring that Eurodad's objectives stay rooted in the needs and perspectives of the ultimate beneficiaries. The Strategic Plan itself was designed to cope with the uncertainties of the global economic and political situation, by mandating a flexible approach by Eurodad, and expanding the number of issue areas, so that Eurodad could respond to new opportunities that can arise in situations of change.

A number of factors affect the institutional and operational capacity of Eurodad to achieve change:

i. *Secretariat size:*

The secretariat is not large enough to support the expansion into new issue areas as agreed in the Strategic Plan, which is why this is addressed in this Action (A1.3 and A4.1). It is worth emphasising that the decision to expand into three new issue areas (climate finance, investment agreements and financial sector rules) was agreed by all members when they unanimously approved the Strategic Plan. They did this not just because these are important issues which several members are already prioritizing, but also is because working on a broad range of development finance issues will help address the need to deal with a complex, uncertain external environment, where issues are inter-related and change opportunities can arise suddenly, making progress on certain issues move more quickly than expected. This problem of the secretariat being too small affects all the other problems as it diminishes the secretariat's ability to help address them. It also means that the network as a whole cannot get the support expected from the secretariat. Work package A4.1 will address this by hiring the additional staff foreseen in the Strategic Plan, but the other work packages will also help address this by improving the capacity and competences of the secretariat and the network as a whole.

ii. *Secretariat competences:*

There are currently no secretariat staff with in-depth expertise on the three new issue areas. In addition the Director's role is spread across all of the areas of work of the organisation, which limits productiveness in terms of forward thinking and horizon scanning. This is interrelated with the issue of how the network functions, noted below, as this problem is shared by many Eurodad members. The increase in number of issues (A1.3) and the plans to improve communications work (A2.1) also mean that the Secretariat's communications team will

struggle to cope with the increase in workload. This is why these areas will be strengthened by new staff brought on as a result of this Action (4.1), which will also strengthen the ability of the secretariat to work across issue areas with the addition of a Vice-Director and Network Development Officer. The Vice-Director will take responsibility for leading policy, advocacy and communications work, freeing up the Director to focus more on forward thinking, strategic planning and quality assurance of research and analysis, as well as management of the organisation as a whole. Finally, the new Strategic Plan emphasises the need to create strategies and coalitions for change. This is a traditional strength of Eurodad, but one that will be strengthened by this Action in terms of better collective strategies (A1.1) and tactics (A1.2) across all the issues Eurodad works on. Work package A4.1 (Recruitment of New Staff) will address this by hiring the additional secretariat staff foreseen in the Strategic Plan, and directing them to these key issues.

iii. *Secretariat procedures and functions:*

At the centre of this problem is the increased fundraising required to meet the demands of a larger secretariat and an ambitious Strategic Plan. This problem is obviously interrelated with other problems in this section. Work package A4.3 (Fundraising Pipeline Planning System) is designed to tackle this problem, as will the hiring of a Fundraising Coordinator under work package A4.1. The increased focus on Monitoring, Evaluation and Learning (A4.2) will also affect and improve all ways of working in the secretariat and the network, and will support fundraising activities (A4.3) by providing evidence of effectiveness and impact. In addition, the Strategic Plan plans an overhaul of all procedures so that they can be gathered together into a user-friendly intranet site, which is underway, though this is not an activity of this Action.

It is also worth noting that, by focusing on the improvement of Eurodad as an umbrella organisation, the Action will also help to address the *broader problems of the global financial and economic system* and its impacts on developing countries. The following summaries are taken from the organisation's Strategic Plan:

- **Tax Justice** (Eurodad Goal i) – “tax avoidance and evasion by multinational corporations and wealthy individuals continue to undermine tax systems in all countries across the world, and cost developing countries billions of dollars in lost resources every year.”
- **Ending debt crises** (Eurodad Goal ii) – “Debt stocks for developing countries have reached their highest level ever, and over 40 low-income countries are in debt distress or at risk of debt distress. Many more are vulnerable to external shocks, or another major financial crisis. A new wave of debt crises would cause substantial development damage and human suffering.”
- **Effective aid** (Eurodad goal iii) – “Much aid is still ‘tied’ to the condition that all supplies are procured from firms in the donor countries. Aid tying increases costs by 15% to 30% and shows that donor countries are prioritising support for their own companies over poverty reduction. It also means that developing countries have less scope to use aid to boost domestic industries.”
- **Publicly-backed private finance** (Eurodad Goal iv) – “Multilateral and European bilateral development finance institutions (DFIs), channelling publicly-backed finance to support the private sector and to leverage private finance into developing countries, have become some of the most important players in today’s development arena. This is despite their unclear development mandate and poor track record of delivering pro-poor development results.”
- **Investment agreements** (Eurodad Goal v) – “the adoption of World Trade Organisation (WTO) and other trade and investment agreements has had the main effect of shrinking the policy space developing countries need if they are to actively manage foreign capital and investment to promote sustainable development and protect human rights.”
- **Climate finance** (Eurodad Goal vi) – “The coming five years will be crucial in terms of determining both the level and type of support provided to developing countries for mitigating their greenhouse gas emissions and adapting to climate change.”
- **Financial sector rules** (Eurodad Goal vii) – “The global financial crisis has had negative impacts on developing countries in two ways. First, the global depression damaged all

economies, costing jobs, trade, investment and aid. Second, the solutions to reforming the financial sector that have been developed either directly in developed countries, or under the G20, and through the Financial Stability Board, have neither fixed the problem, nor been designed to benefit developing countries.”

All of these issues are deeply interrelated, and changes in one area affect the others, hence the need for increasing capacity to connect issues, noted above.

In addition, Eurodad’s Strategic Plan focuses on the importance of the crosscutting issues of gender, global economic governance, and responsible finance standards, which affect all the policy issues mentioned above, creating interrelated problems. For example, the loss of tax revenues to tax avoidance and tax evasion reduces the resources for public expenditure, which research shows has a disproportionate impact on women and girls.¹³ Another example is the lack of effective, democratic global institutions, which means that developing countries are routinely excluded from decision-making. For example, the OECD’s leadership on reform of tax rules means that over 100 developing countries cannot participate in making the rules that will affect them.

Fit with the organisation’s strategy

The following table shows how the Action is focused on directly achieving important objectives, results and indicators of Eurodad’s Strategic Plan, which are summarised in Eurodad’s Results Management Framework.

Results Management Framework Objective	Action focus
<i>Issue Area 5-year goals</i>	
i. Tax Justice ii. Ending Debt Crises iii. Effective Aid iv. Publicly-backed Private Finance	Not a focus, though there will be improved effectiveness through capacity development initiatives under the Action.
v. Investment Agreements vi. Climate Finance vii. Financial Sector Rules	Focus (work package A1.3) – as these are new issue areas, where Eurodad will need to build capacity from a low base.
<i>Organisational Development Objectives</i>	
A. Research and Analysis A1. Research Guide A2. Rapid, Robust Reaction System	Not a focus – to be implemented from existing resources
B. Advocacy and Network Strengthening B1. Network strengthening strategy B2. Policy Advocacy & Communications Toolkit B3. Advocacy planning coordination system	Focus (A1.1, A1.2, A2.1, A2.2, A3.1, A3.2) – these are key to Eurodad’s ability to deliver the objectives of the strategic plan
C. Eurodad secretariat C1. Organogram Objective C2. Fundraising Pipeline Planning System C3. Systems & Procedures Intranet*	Partial focus (A4.1, A4.2, A4.3) – strengthening those areas that are essential to delivering the Action

¹³ See for example: Christian Aid (2014) *Taxing men and women: why gender is crucial for a fair tax system* <http://www.christianaid.org.uk/images/taxing-men-and-women-gender-analysis-report-july-2014.pdf>

These focus elements have been chosen because they represent the areas where the significant additional funding that this Action would provide will make the most difference. The Strategic Plan was also designed to recognise that the speed with which Eurodad's ambitions to expand the scope and reach of the network will depend on funding. Therefore it is worth noting that:

- This Action will allow a planned expansion with secure resources for the first two years (combining existing resources and Action resources) with the Action resources being progressively replaced in years three and four by diverse alternative funding sources, thanks to the upgrade in fundraising that this Action will allow (A4.3). If this proposal is unsuccessful, it is likely that the expansion would take place at a much slower rate, and may not allow all elements of the expansion to proceed together or at the same level.
- This Action would allow key capacity development initiatives of the Strategic Plan (A1.1, A1.2, and A1.3 in particular) to be undertaken in a more comprehensive and participative way, greatly enhancing their effectiveness, particularly by including resources for 13 affiliates (that are all Eurodad members) to be actively engaged.

In addition, Eurodad's Strategic Plan identifies three crosscutting issues (gender, global economic governance and responsible finance standards) that are to be implemented through both mainstreaming within all Eurodad work, and through carefully selected projects.

Given the central importance of mainstreaming gender into Eurodad's work, which is emphasised in the Strategic Plan, two of the work packages under this Action have been identified as special projects, following the Strategic Plan's logic that explicitly gender-focused projects will deepen experience and understanding of staff, allowing improvements to the overall integration of gender across all Eurodad's work. These are the Policy, Advocacy and Communications Toolkit (Strategic Plan initiative B2, and work package A1.2 of this Action), and the Advocacy Planning Coordination System (Strategic Plan initiative B3/work package A1.1.) Several Eurodad members have in-depth expertise on gender issues, which Eurodad can draw on, as they are involved across the various work packages of the Action, as described in section 2.2.2.2. In particular, ActionAid's in-depth experience and expertise on gender issues is one of the reasons they have been chosen as an affiliate with a substantial role in implementing these two work packages (see section 2.2.2.2).

Potential synergies with other initiatives

This Action has significant synergies with the **European Union's commitments at global and multilateral level**. The most important of these to highlight are the agreements on Financing for Development reached in 2015 in the Addis Ababa Action Agenda¹⁴ and the United Nation's Sustainable Development Goals,¹⁵ also agreed in 2015 in the agreement: *Transforming our world: the 2030 Agenda for Sustainable Development*.¹⁶

By strengthening its institutional, operational and representational capacity, Eurodad will be better placed to undertake coordinated actions and advocate for policy changes that directly support both of these important initiatives, as the examples below show, which are grouped around the seven issue areas of Eurodad's Strategic Plan:

- **Tax Justice** (Eurodad Strategic Plan Goal i) – The Addis Ababa Action Agenda devotes significant attention to this issue, including saying that: *“We will redouble efforts to substantially reduce illicit financial flows by 2030 ... We will also reduce opportunities for tax avoidance, and consider inserting anti-abuse clauses in all tax treaties. We will enhance disclosure practices and transparency in both source and destination countries, including by*

¹⁴ http://www.un.org/ga/search/view_doc.asp?symbol=A/CONF.227/L.1
http://www.un.org/ga/search/view_doc.asp?symbol=A/CONF.227/L.1

¹⁵ <http://www.un.org/sustainabledevelopment/sustainable-development-goals/>
<http://www.un.org/sustainabledevelopment/sustainable-development-goals/>

¹⁶ http://www.un.org/ga/search/view_doc.asp?symbol=A/RES/70/1&Lang=E
http://www.un.org/ga/search/view_doc.asp?symbol=A/RES/70/1&Lang=E

seeking to ensure transparency in all financial transactions between Governments and companies.”

- **Ending debt crises** (Goal ii) – the 2030 Agenda for Sustainable Development states that: *“We recognize the need to assist developing countries in attaining long-term debt sustainability through coordinated policies aimed at fostering debt financing, debt relief, debt restructuring and sound debt management, as appropriate.”*
- **Effective aid** (Goal iii) – the 2030 Agenda for Sustainable Development calls for *“Developed countries to implement fully their official development assistance commitments”* – getting European countries to meet key parts of these commitments is the goal of Eurodad’s work in this area.
- **Publicly-backed private finance** (Goal iv) – The Addis Ababa Action Agenda devotes significant attention to this issue, highlighting not just the importance of the agenda, but also noting that *“projects involving blended finance, including public-private partnerships, should share risks and reward fairly, include clear accountability mechanisms and meet social and environmental standards.”*
- **Investment agreements** (Goal v) – The Addis Ababa Action Agenda states: *“we will endeavour to craft trade and investment agreements with appropriate safeguards so as not to constrain domestic policies and regulation in the public interest. We will implement such agreements in a transparent manner”*, chiming with the focus of Eurodad’s work on this new issue area.
- **Climate finance** (Eurodad Goal vi) – The Addis Ababa Action Agenda highlights the continued importance of this topic, stating that *“... developed countries committed to a goal of mobilizing jointly \$100 billion a year by 2020”*.
- **Financial sector rules** (Eurodad Goal vii) – The Addis Ababa Action Agenda states that: *“We acknowledge the importance of robust risk-based regulatory frameworks for all financial intermediation, from microfinance to international banking”*. These are of the kind that Eurodad’s new issue area focuses on, which this Action is designed to develop (A1.3).

Additionally, gender issues, which are prioritised in the Eurodad Strategic Plan and integrated into this Action, feature prominently in the Addis Ababa Action Agenda, which states: *“We are committed to women’s and girls’ equal rights and opportunities in political and economic decision-making and resource allocation and to removing any barriers that prevent women from being full participants in the economy.”* Gender equality is also Goal number 5 of the UN Sustainable Development Goals.

All of the goals of Eurodad’s Strategic Plan and this Action correlate directly with **EU policies in the field of development cooperation**. First, there is alignment with the principles of the 2012 Communication, *The Roots of Democracy and Sustainable Development: Europe’s Engagement with Civil Society in External Relations*¹⁷ and subsequent Council Conclusions. The Communication states that *“the EU will also support CSOs active at the European and global levels which, in cooperation and partnership with local CSOs, act to monitor policy coherence for development, holding the international community to account for delivering on aid commitments and contribute to the promotion of global citizens’ awareness.”*

This Action is particularly relevant to the EU’s Policy Coherence for Development (PCD) commitments. The political commitment to PCD is embedded in the *European Consensus on Development* (2006)¹⁸ and was reaffirmed in the *Agenda for Change* (2011)¹⁹ which states *“that the EU shall take account of the objectives of development cooperation in all policies that it implements which are likely to affect developing countries, and that these policies support development objectives.”* Eurodad’s work to influence EU policies and the positions of the EU and EU member states within multilateral organisations do exactly that across a wide range of key PCD issues.

¹⁷ <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2012:0492:FIN:EN:PDF>

¹⁸ <https://ec.europa.eu/europeaid/node/1364>

¹⁹ <https://ec.europa.eu/europeaid/node/1365>

Furthermore, Eurodad's new issues of investment agreements, climate finance and financial sector rules are particularly relevant to the EU's objectives in those areas. The following is taken from the recent EC Communication, *A Global Partnership for Poverty Eradication and Sustainable Development after 2015* (February 2015), unless otherwise stated:

- **Investment agreements** (Eurodad Goal v) – The EC Communication, *Towards a comprehensive European international investment policy* (2010) states: “*Investment agreements should be consistent with the other policies of the Union and its Member States, including ... development policy ... A common investment policy should also be guided by the principles and objectives of the Union's external action more generally, including the promotion of the rule of law, human rights and sustainable development.*”
- **Climate finance** (Eurodad Goal vi) – “*...it is important to make sure that the financing framework for the post-2015 agenda is fully coherent and aligned with climate finance... It is to be noted in this context that the EU has decided already for the period 2014-2020 to dedicate 20% of its budget – including for external actions – to climate-related projects and policies.*”
- **Financial sector rules** (Eurodad Goal vii) – “*At global level, implementing the post-2015 agenda will also require an effective international system of governance, stable financial markets and economic cooperation, including the necessary levels of regulation.*”

This Action is not the continuation of a previous EC-funded Action. However, Eurodad will build on the lessons learned from the two EC-funded projects that Eurodad led which end in 2015²⁰ and will build upon a current EC-Funded project which is helping already to build the capacity of groups working on debt and private finance issues.²¹

²⁰ *Development finance for equitable growth: enhancing dialogue between EU civil society and decision-makers* (2012-2015) and *Addressing illicit capital flight for policy coherence for development* (2013-2015)

²¹ Action grant CSO-LA/2017/388-224: Citizens for Financial Justice– Led by Christian Aid

2.2.1.3 Describe and define the Target Groups and final beneficiaries, their needs and constraints, and state how the action will address these needs

Description of Target Groups and final beneficiaries

The Target Groups of this Action are:

Target Group A: *The members of the Eurodad network*, both the organisations and staff in those organisations. These are obvious targets as the size and capacity of this group is the main factor affecting the success of the Eurodad network to achieve its goals.

- **Organisations:** Eurodad currently includes 47 organisations in 20 European countries, of which 18 countries are in the EU. Eurodad members are selected by other Eurodad members at the General Assembly: each candidate organisation must explain why they want to join Eurodad, what they bring to the network, and must agree to pay the membership fee, before their candidacy is voted on by existing members. Under the Strategic Plan (objective B) and this Action, Eurodad will expand its membership into ten additional EU member states, so that it will cover all 28 EU countries, and include at least 56 organisations. The participation of Eurodad members in all of the work packages of the Action is elaborated in section 2.2.2.2. The Eurodad network is comprised of the most active CSOs in Europe that work on policy, advocacy and campaigning on development finance issues. As detailed in the FPA application, this means that Eurodad members vary in size and type, including several large international non-governmental organisations (NGOs) and 12 national networks, as well as large national NGOs and smaller organisations that specialise in development finance issues.
- **Staff:** This Action will target all policy and advocacy staff that work on development finance or related issues in the member organisations, as these are the essential actors who shape the agenda and deliver the work for those organisations. An audit of existing capacity conducted as preparation for Eurodad's Network Strengthening Strategy (Strategic Plan capacity development initiative B1) revealed an estimate of 86 total full-time policy and advocacy staff working in Eurodad member organisations on Eurodad issues, an average of just under two staff per member. The Action will also target heads of policy, advocacy and campaigns departments, who have key decision-making powers within their organisations, and campaigns and communications staff who help implement this work. The Action will aim to reach all members of this Target Group. For example, it will include intensive strategic planning training based on collectively developed guidelines (A1.1) for 280 participants from Eurodad members,²² while 840 participants from Eurodad members will take part in joint actions in Europe based on common strategies (A1.2.5).²³

Target Group B: *Other European CSOs working on development finance issues* including the staff in those organisations.

- **Criteria for selection:** This Target Group has been strategically selected for several reasons. First, though the Eurodad network is the core group of organisations working across Europe on development finance, there are many other organisations with connections to Eurodad's work that can become powerful additions to the coalitions that Eurodad builds to achieve change. For example, Eurodad's tax justice work, which has helped deliver major changes to European rules – such as requirements for registers of the beneficial owners of companies to

²² 140 will be trained at Issue-based strategic planning meetings (A1.1.2) 100 at Eurodad international conferences (A1.1.3) and 40 at the Policy Forum (A1.1.4)

²³ An average of 10 participants from Eurodad member organisations for each of the 84 planned actions.

combat tax evasion and money-laundering – involves all the members of a broader coalition called Tax Justice-Europe (TJ-E), which Eurodad coordinates. There are currently 73 organisations that are members of TJ-E. Second, these organisations are potential Eurodad members (see work package A2.2), and many are in European countries where Eurodad currently has no presence: bringing them into the Eurodad fold would strengthen the representivity of Eurodad, and its ability to affect change. Third, Eurodad has found that joint strategising and planning of advocacy initiatives works best when all the talents available can be drawn upon and it is easy for new organisations and staff to join collective work, which is why Eurodad’s Strategic Plan emphasises a ‘coalition of the willing’ approach, rather than one based exclusively on working with the Eurodad network.

- *Quantification:* No current estimate of numbers of this Target Group currently exists, but two useful indicators are the number of members of two key regional development finance networks that Eurodad supports. The EuroIFI network, which focuses on influencing European representation at International Financial Institutions, including the World Bank, International Monetary Fund (IMF), European Investment Bank (EIB) and European Bank for Reconstruction and Development (EBRD) has over 50 members of its active listserv. As mentioned previously there are currently 73 members of the Tax Justice Europe. This Action will target all policy and advocacy staff that work on development finance or related issues in the target organisations, as these are the essential actors who shape the agenda and deliver the work for those organisations. It will also target heads of policy, advocacy and campaigns departments, who have key decision-making powers within their organisations. The Action will aim to reach a significant proportion of members of this Target Group. For example, it will include intensive strategic planning training based on collectively developed guidelines (A1.1) for 290 participants from non-Eurodad CSOs in Europe,²⁴ while 500 non-Eurodad European CSO participants will take part in joint actions in Europe based on common strategies (A1.2.5). In addition, the updated Audience Survey (A2.1.1) will be a systematic attempt to fully map and quantify this group, so that the updated Communications Outreach Plan (A2.1) can aim to reach all members of the Target Group with targeted communications tailored to their needs.

Target Group C: *The global CSO coalitions and key CSO networks from other regions that are active on Eurodad issues.*

Selection criteria: As noted above, Eurodad’s focus on changing the policies and practices of multilateral organisations means that working as part of global coalitions and in partnership with networks from other continents is essential. In addition, linking with and learning from partners in developing countries is also a very important for ensuring that Eurodad’s objectives stay rooted in the needs and perspectives of the ultimate beneficiaries of the Action. By targeting other networks and coalitions, Eurodad maximises effectiveness, as each network can focus on mobilising its own regional members, and the umbrella organisations can focus on coordination at a multilateral level, including within global coalitions.

Quantification: Currently, the main global CSO networks and coalitions that are central to Eurodad work include: the Global Alliance for Tax Justice (GATJ),²⁵ which includes hundreds of member organisations across five continents;²⁶ and the Reality of Aid network,²⁷ which includes 33 member organisations in Africa, 46 in Asia/Pacific and 55 in Latin America. Eurodad sister networks,

²⁴ 140 will be trained at issue-based strategic planning meetings (A1.1.2), 120 at Eurodad international conferences (A1.1.3) and 30 at the Eurodad Policy Forum (A1.1.4).

²⁵ <http://www.globaltaxjustice.org/>

²⁶ <http://www.globaltaxjustice.org/about-us/>

²⁷ <http://www.realityofaid.org/>

Afrodad,²⁸ Latindadd (22 members across Latin America)²⁹ and APMDD (39 member organisations across Asia³⁰) are also key members of this Target Group. The staff members of this Target Group are not currently well quantified, which is why the Action includes a scoping exercise in Year One to properly identify the Target Group (A3.1.1). However, given the number of organisations highlighted above, the total number of staff likely to be engaged in Eurodad issues will be significant. Therefore, Eurodad will focus on the staff members of the network organisations, and staff that are active at international level and who focus on influencing multilateral organisations. The Action will aim to reach a significant proportion of members of this Target Group. For example, it will include intensive strategic planning training based on collectively developed guidelines (A1.1) for 290 participants from non-European CSOs,³¹ while 125 non-European CSO participants³² will take part in capacity development trainings using the new Policy, Advocacy and Communications Toolkit (A1.2.6).

Eurodad's theory of change, as detailed in the Strategic Plan, clearly defines how the change required for Eurodad to meet its goals happens in practice. The rationale for selection of these Target Groups has been chosen because Eurodad has found it very successful to strengthen the capacity and coordination of these CSO actors to work together around common, results-focused strategies. Eurodad can then influence the ultimate targets, the policy-makers in multilateral institutions and the European policy-makers. These policy-makers should therefore also be regarded as key stakeholders in the Action.

Through influencing the policies and practices of powerful multilateral institutions, Eurodad aims to have a major impact on the ultimate beneficiaries – poor women and men in developing countries. Eurodad's issue area goals in its Strategic Plan were selected because of evidence that, when achieved, they would have a significant impact on these beneficiaries. For example, Eurodad's Strategic Plan aims to tackle the problems in the international tax system. A recent Eurodad analysis of the best available evidence has shown tax evasion and avoidance costs developing countries hundreds of billions of dollars per year in lost tax revenue.³³ Preventing this loss could translate into significant additional public revenues that would then be available for vital anti-poverty investments, which would contribute to the achievement of the Sustainable Development Goals.

Key stakeholders other than members

The key stakeholders in this Action include all three of the Target Groups above and they will also be beneficiaries of this Action. The following additional stakeholders have been identified:

- The European and multilateral policy-makers who are the targets of strategies and coordinated actions proposed for this Action are also stakeholders. These strategies and actions will only be effective if designed with these policy-makers in mind. Eurodad's long history of targeting policy-makers along with insights gained from previous successes will inform these strategies and activities.

²⁸ Afrodad is not a membership-based organisation, but is a regional platform, so the organisations it works with across Africa vary depending on the issue and the initiative.

²⁹ <http://www.latindadd.org/quienes-somos/>

³⁰ <http://www.apmdd.org/>

³¹ 140 will be trained at Issue-based strategic planning meetings (A1.1.2) 120 at Eurodad international conferences (A1.1.3) and 30 at the Policy Forum (A1.1.4)

³² An average of 5 for each of the 25 trainings planned

³³ Estimates of the precise amounts are incomplete, please refer to: Griffiths, Jesse (2015) *Financing for Development: Key challenges for policy makers* (Eurodad, Brussels).

- Eurodad’s work to change policies and practices involves mobilising coalitions for change that go beyond CSOs and will involve citizens across Europe, who are also stakeholders in the Action. A recent example of citizen engagement through the Eurodad network was the multi-country petition that garnered over 100,000 citizen’s signatures in favour of a systematic debt workout procedure to prevent and rapidly resolve debt crises, which was part of a European Commission-funded project.³⁴
- In addition, working with journalists and the media are central parts of the advocacy and campaign work that Eurodad uses to deliver change. An example of this is the *Stop Tax Dodging* report, an annual collaboration among partners across Europe, coordinated by Eurodad, which examines the policies of 18 EU member states to combat the tax avoidance and evasion that cost developing countries hundreds of billions of Euros in lost tax revenue every year. The 2017 edition of this report was covered by around 43 media platforms, including some of the most influential in key national settings.

Relevance to the needs and constraints of Target Groups and final beneficiaries

The following table summarises the needs of the Target Groups, the constraints that affect those needs and how the Action will be relevant to those needs and constraints. These needs and constraints were identified through discussion and consultation with representatives of all the Target Groups during the year-long process of developing Eurodad’s Strategic Plan and are summarised in Eurodad’s theory of change in the Strategic Plan. The capacity development objectives that form the basis for this Action were included in the Strategic Plan to address these needs and constraints.

Need	Related constraints	Relevance of the Action
1. High-quality staff	<ul style="list-style-type: none"> a. High turnover b. Lack of resources for training and capacity development 	<ul style="list-style-type: none"> • Advocacy planning coordination system (work package A1.1) allows new staff to situate their work within common strategies already shared across the Eurodad network, build their networks by attending strategic planning meetings with key allies working on their issue, and deepen their understanding of their issue areas. • Policy Advocacy and Communications Toolkit (A1.2) provides both a complete resource that can help induct new staff, provide the basis for in-house training in Target organisations, and be used as a reference tool to enable learning on the job.
2. Focus on clearly defined objectives and results, with specialism in clearly defined issue areas (to focus and achieve)	<ul style="list-style-type: none"> a. Difficulty in defining objectives with limited resources in many Target Group organisations, where staff cover several issues b. Lack of resources and capacity development and 	<ul style="list-style-type: none"> • Advocacy planning coordination system (A1.1) and Strategies and Workplans for New Issue Areas (A1.3) will allow organisations with limited capacity to benefit from the collective capacity of the network to set common objectives and results. • Participation in the Eurodad network is designed to give all members access to collective information, analysis and expertise, including that housed in the secretariat. This will be strengthened through the Action by the introduction of three new issues (A1.3), improvement of communications outreach (A2.1), the addition of new members who will bring new

³⁴ *Prompting change in European attitudes toward the IMF’s development role and developing country debt management to help achieve the MDGs* (2013-2015, project led by Jubilee Debt Campaign)

results with limited resources)	learning on complex issues	perspectives and expertise to the network (A2.2) and the strengthening of the expertise of the secretariat (A4.1).
3. Spotting new opportunities and development finance issues outside current focus	<p>a. Most Target Group organisations cover limited range of development finance issues</p> <p>b. Insufficient attention to cross-cutting issues, which by their nature can be more difficult to consider for organisations with limited resources</p>	<ul style="list-style-type: none"> Expanding to three new issues allows the network to include a near complete coverage of the bandwidth of development finance issues (A1.3). In addition, a new Vice-Director at the secretariat (A4.1.1) will allow both that person and the Director to increase their attention to the linkages between issues, and free up Director level time to horizon-scan for new issues. Finally, greater attention to crosscutting issues as a result of the Strategic Plan, which are mainstreamed through the activities of this Action, will also improve the scope of understanding of the secretariat and network.
5. Clear theory of change, with identified intermediate outcomes and targets	<p>a. Not all organisations have the capacity to develop their own internal guidelines or training on theories of change</p> <p>b. Monitoring and evaluation systems of organisations with limited resources are often weak</p>	<ul style="list-style-type: none"> The Advocacy Planning Coordination System (A1.1) is explicitly focused on providing guidelines that are useful for the Target Groups, and on ensuring they address capacity constraints, including through targeted trainings. The upgraded Monitoring, Evaluation and Learning (MEL) system (A4.2.7) will improve the extent to which the secretariat is able to monitor and evaluate progress against collective priorities, and the effectiveness of joint actions, and provide a resource that all Targets can use for their own monitoring and evaluation.
6. Need to work as part of global coalition to influence many multilaterals	<p>a. Limited capacity of key developing country partners to engage in global coalitions</p> <p>b. Lack of clear joint strategies to guide the work of global coalitions</p>	<ul style="list-style-type: none"> Supporting Eurodad's sister Debt and Development networks in Africa, Asia and Latin America (A3.2) will make a contribution to expanding their capacity, through collective fundraising, and Eurodad support to capacity development. The Advocacy Planning Coordination System (A1.1) and the Policy, Advocacy and Communications Toolkit (A1.2) will include specific opportunities for developing country partners to benefit from Eurodad capacity development initiatives. Joint Strategy Development with Global Partners (A3.1) will result in agreed joint global strategies in at least two Eurodad work areas.
7. Need to work as part of European coalition to influence	a. Need for strong coordination from the centre to allow organisations with a national focus to	<ul style="list-style-type: none"> Increased capacity of secretariat (A4.1) will improve coordination, across a larger range of issues (A1.3). Capacity development will improve the quality of collective strategies (A1.1) and actions (A1.2).

many multilaterals, and the EU	<p>exert collective influence through joint strategies and coordinated actions</p> <p>b. Organisations that have less capacity to be active are not always aware of key moments when their actions can make a difference</p>	<ul style="list-style-type: none"> Improved communications outreach (A2.1) will make sure that individuals and organisations who are not in the ‘inner circle’ of activity will receive timely information relevant to their needs, including on how to participate in common actions.
8. Need to be flexible, adjusting tactics to suit external opportunities and objectives	<p>a. Funding is often tied to specific projects with pre-determined outcomes rather than supporting strategic plans</p> <p>b. Insufficient funding may lead to cuts in activities, or prevent most useful activities from being undertaken</p>	<ul style="list-style-type: none"> Action is designed to support the Strategic Plan, which mandates flexible choice of tactics. Action budget is designed to ensure that – in coordination with existing sources of funding, Eurodad budget is fully funded for Years One and Two of the Action. In addition, the Action will lead to improved Eurodad fundraising (A4.3) and planning (A4.2), both of which will be crucial for raising alternative sources of funding, with the Action grant designed to fall as a share of total Eurodad revenue to zero by the end of the grant period (while maintaining a similar level of overall resources), to ensure sustainability.

Relevance to the needs and constraints of final beneficiaries

Poor women and men in developing countries – the final beneficiaries of this action – are deeply affected by economic rules and systems influenced by the multilateral organisations that Eurodad targets. The issue objectives in Eurodad’s Strategic Plan (numbers i. to vii.) have been explicitly chosen because evidence shows that policy changes could have a major transformative impact on ending poverty and delivering human rights for all. For example:

- Improvements in global tax standards and transparency of multinational accounts (Goal i of the Strategic Plan) could significantly reduce the hundreds of billions of Euros that developing countries lose in taxation each year. As the Strategic Plan sets out (p9): *“Taxation is not only a key tool to correct inequalities, finance public services and strengthen the accountability of governments. It also remains the most reliable and sustainable source of finance for developing countries. However, tax avoidance and evasion by multinational corporations and wealthy individuals continue to undermine tax systems in all countries across the world, and cost developing countries billions of dollars in lost resources every year.”*
- Ending debt crises through the adoption of fair and efficient debt workout mechanisms (Strategic Plan Goal ii) is vitally important for poor men and women in developing countries, as they are worst affected by the economic damage these crises inflict, and the subsequent cuts to public expenditure. As the Strategic Plan sets out (p10): *“Debt stocks for developing countries have reached their highest level ever, and over 40 low-income countries are in debt distress or at risk of debt distress. Many more are vulnerable to external shocks, or another major financial crisis. A new wave of debt crises would cause substantial development damage and human suffering.”*

- Ensuring that all overseas development assistance (ODA, or ‘aid’) is of the highest quality (Strategic Plan Goal iii) is vitally important for the poor, particularly those who live in the poorest countries, as *“The transfer of aid money from wealthy countries can be an effective instrument for fighting poverty and promoting sustainable development, and is a vital resource for low-income countries in particular, where it makes up close to 10% of gross domestic product (GDP)”* (Strategic Plan, p11).

Ensuring participation by the Target Groups and final beneficiaries

Section 2.2.2.2 gives a detailed explanation of how Target Groups will participate in the Action. In summary:

- Eurodad members (**Target Group A**) will participate actively in all of the work packages of the action, with 13 members being deeply involved as affiliates in designing and implementing four of the major work packages of the Action (A1.1, A1.2, A1.3 and A2.2). For example, the Advocacy Planning Coordination System (A1.1) will include 14 issue-based strategic planning meetings, two international conferences and one policy forum that will build the capacity of at least 280 key members of staff³⁵ across all Eurodad member organisations. The Policy, Advocacy and Communications Toolkit (A.1.2) will be used to train 500 participants from Eurodad member organisations, and 840 will participate in joint actions across Europe as a result of this work package. It is important to emphasise that the Action directly implements key elements of Eurodad’s Strategic Plan, which has been approved by the Eurodad General Assembly of members on the advice of Eurodad’s board, which is elected by Eurodad members. The enthusiasm for the Action among Eurodad’s members is shown by the fact that 38 (out of 47) Eurodad members are included as affiliates (13 members) or associates (25 members).
- Other European CSOs working on development finance issues (**Target Group B**) will participate actively in four of the work packages (A1.1, A1.2, A1.3, A3.1). For example, the Policy, Advocacy and Communications Toolkit will include capacity development training using the Toolkit, which will build the capacity of at least 500 staff in at least 50 organisations.³⁶ This will help 2,380 participants from this Target Group to take part in joint actions across Europe based on common strategies (A1.2.5). In order to ensure that the capacity development helps target staff to embark on a supported journey, rather than being a one-off experience, it is anticipated that many of these participants will be engaged in several activities. In addition, the Communications Outreach Plan (A2.1) is specifically designed to reach out to members of staff in this Target Group to encourage them to become more actively engaged on Eurodad issues, and the New Members Recruitment Plan (A2.2) will build stronger ties with this Target Group so that several new organisations become Eurodad members.
- Global CSO coalitions and networks (**Target Group C**) will participate actively in Joint Strategy Development with Global Partners (A3.1), and Eurodad’s sister networks will also work with Eurodad on organisational development improvements (A3.1). This Target Group will also be invited to participate in the trainings, joint actions, and other capacity development initiatives of the Action (A1.1, A1.2, A1.3). It is planned that 140 members of this Target Group will have their capacity built in Advocacy Planning and Coordination

³⁵ Calculated as an average of at least ten staff participants per each of 14 issue-based strategic planning meeting (A1.1.2), 50 staff participants in each of two International Conferences (A1.1.3) and 40 staff participants in one Policy Forum (A1.1.4).

³⁶ 25 trainings with an average of 20 staff from European CSOs working on development finance issues (that are not Eurodad members).

(A1.1),³⁷ and a further 125 will participate in trainings in the use of the Policy, Advocacy and Communications Toolkit (A1.2.6).³⁸

Given that Eurodad is a European network, participation of final beneficiaries will happen in two ways. First, and most importantly, Eurodad's sister networks and other partner networks from developing countries include organisations with direct connections to final beneficiaries. The Eurodad Strategic Plan emphasises the central importance of working collaboratively with partners from developing countries, precisely to ensure that Eurodad remains connected with the priorities emerging from organisations that represent and work for the final beneficiaries in the countries where they live. This is why there are two workpackages (A3.1 and A3.2) specifically focused on working with this Target Group, which will also be involved in the other capacity development initiatives of the Action.

Second, several Eurodad members develop their positions based on their experiences of working with final beneficiaries through programmes in developing countries, or sometimes more directly by ensuring participation from beneficiaries in the development of their strategic approach. The links to organisations working directly with the final beneficiaries is one reason why ActionAid and Both Ends have been selected as affiliates, for example.

2.2.1.4 Particular added-value elements

Given that development financing affects all aspects of development, this Action brings added value throughout the focus areas of this call. For example:

- **Human rights:** Eurodad's vision and purpose explicitly place human rights at the centre of its work. The choice of topics and the goals set in the Strategic Plan are always underpinned by a commitment to human rights. For example, Eurodad's Strategic Plan Goal ii on ending debt crises explicitly focuses the multilateral debt work out procedure (which is the goal of the work) to the need for it to make "*independent, fair and transparent decisions and [be] linked to the UN's development and human rights agendas*". In addition, Eurodad will integrate human rights into the capacity development initiatives at the centre of this Action. For example, in two key reference guides to be produced under this Action, the Guidelines for strategic advocacy planning (A1.1.1) and the Policy, Advocacy and Communications Toolkit (A1.2.4) special modules will show how the elements of the guides can be linked to human rights.
- **Good governance:** As the Strategic Plan notes: "*Eurodad has a strong track record in this area to build on, having helped produce detailed proposals for reform of many key institutions, including the World Bank and IMF. In addition, many of our goals listed above involve significant redesign of the system of global economic governance*". During the Strategic Plan period, Eurodad is committed to collating and publishing proposals for reform of global economic governance, and keeping these up to date, though this activity is not a focus of this Action. However, Eurodad's Strategic Plan treats this issue as a crosscutting issue, as it needs to be effectively integrated into the workplans for all issue areas. In particular, the Strategies and Workplans for New Issue Areas (A1.3) will prioritise examining how good governance should be integrated into strategic objectives.
- **Gender equality and women's empowerment:** This is prioritised in the Eurodad Strategic Plan as a crosscutting issue. Eurodad has adopted a twin-track approach:
 - The first track means that gender will be integrated into all work areas. This means that all work packages under this Action will integrate gender issues. To ensure that this is the case, terms of references and plans for all major activities will have a section explaining how gender issues have been considered and how the Activity has been adjusted as a result. In addition the Monitoring, Evaluation and Learning (MEL)

³⁷ Calculated as 5 participants on average in each of the 14 Issue-based strategic planning meetings (A1.1.2), 30 in each of the two Eurodad International Conferences (A1.1.3) and 10 in the Eurodad Policy Forum (A1.1.4).

³⁸ Calculated as an average of 5 participants from this Target Group for each of 25 trainings.

- Framework (A4.2.7) will contain guidance on how to monitor and evaluate gender integration, so that lessons can be learned and practices can be gradually improved.
- The second track is to identify at least one major project each year where special attention will be given to gender issues. Under this Action, these will be the Policy, Advocacy and Communications Toolkit (A1.2) and the Advocacy Planning Coordination System (A1.1). Several Eurodad members have broad expertise on gender issues, and Eurodad will draw on this, as they are involved across the various work packages of the Action, as described in section 2.2.1.3. ActionAid has been chosen as an affiliate with a substantial role in implementing these two work packages, in part because of their in-depth experience on gender issues (see section 2.2.2.2).
 - **Environment and climate change:** Environmental sustainability is at the heart of the organisation's vision and purpose, and as such the Eurodad Strategic Plan prioritises climate finance as a major new issue to work on. The development of the workplan and strategy for Eurodad's work on climate finance is included in this Action under work package A1.3. In addition, as a cross-cutting priority, efforts will be made to integrate environmental sustainability across all work packages, and specific modules on environmental sustainability will be included in the two major capacity development guides in this Action: namely, the Policy, Advocacy and Communications Toolkit (A1.2.4) and the Guidelines for Strategic Advocacy Planning (A1.1.1). Several Eurodad members have expertise on environmental issues, and Eurodad will draw on this, as they are involved across the various work packages of the Action, as described in section 2.2.2.2.

2.2.2 Description of the Action

2.2.2.1 Description

Expected results

The Action will result in a structural reinforcement of the Eurodad network, and a significant development of capacity. This will allow Eurodad to enhance its voice and expand its representational capacity to more members on more development finance issues, in all EU countries, thus improving dialogue with and influence on EU institutions and other multilateral organisations on development finance policies, in the context of the implementation of the post-2015 framework.

This action is designed to target one specific objective:

To strengthen the institutional, operational, and representational capacity of Eurodad, including the role and responsibilities of Eurodad network members for coordinated advocacy at European level on an expanded number of development finance issues, including coordinated national level action across European states, and the capacity of Eurodad to reinforce global coalitions and networks.

Building stronger networks requires significant investment. Eurodad's aim is to build a network with active and engaged members that contribute to high-quality outputs and outcomes and with an increased capacity to influence decision-makers. Informed collective action based on clear strategies is the key to Eurodad achieving its long-term goals. Engaged and active members working together have been the key to Eurodad's past success in securing change. In order to capitalise on and replicate these successes, Eurodad will actively recruit new members and expand its constituency to all EU member states.

The Action will meet the specific objectives by achieving the following four clearly specified results, taken from the organisation's Strategic Plan, with targeted work packages related to each. The focus on these four results was chosen because (a) they are central to Eurodad's ability to achieve the objectives of the Strategic Plan, and (b) they are areas of capacity development for which this grant funding could make the biggest difference compared to existing and projected other sources of funding for Eurodad.³⁹

Result	How it contributes to the specific objectives of the Action
Result 1 (R1) – <i>Joint issue-based strategies, including building necessary capacity of members, are agreed and implemented and help deliver policy change towards Eurodad goals</i>	Joint strategies are the key to undertaking effective coordinated advocacy at a European level, as they enable Eurodad members to agree common objectives, identify a clear theory of change on how the objectives can be achieved, and allow for action at national level to be coordinated around a common strategy. Only by acting together around a common strategy can Eurodad influence the policy-makers in EU member states that can, in turn, use EU influence to change the policies and practices of multilaterals.
Result 2 (R2) – <i>The reach of the Eurodad network is extended to include members in all EU member states</i>	Expanding membership to include all EU member states will greatly strengthen Eurodad and members' capacity for coordinated advocacy at a European level, as it means coordinated actions can hope to influence all EU member states, improving Eurodad's ability to

³⁹ How this application fits with Eurodad's other funding sources is explained in more detail in section 2.2.2.6.

	influence policy-makers, particularly the European Council. It will mean that – no matter what kind of majority is required within the EU to change policies – Eurodad can hope to build it. It also widens the scope of MEPs that Eurodad can work with, and the enhanced representational capacity of the organisation will make Eurodad an even more credible interlocutor with the European Commission as well as the other multilaterals that Eurodad targets, such as the World Bank.
Result 3 (R3) – Effective global coalitions with joint strategies deliver results (policy change objectives) in at least two Eurodad issue areas	The multilateral organisations that the Eurodad network targets cannot normally be influenced by European policy-makers alone. Coordinated pressure must also be brought to bear on governments around the world. Again, the key for effective CSO influence is to share a common strategy within a global coalition. Using these strategies to deliver change, beginning with two issue areas, will be both a result of Eurodad’s capacity to reinforce global coalitions, and will also result in improved capacity, as lessons are learned for the other issue areas that the Eurodad network works on.
Result 4 (R4) – The Eurodad secretariat expands to planned size, maintaining a highly motivated, experienced team delivering results and effectively supporting the network	The Eurodad Strategic Plan emphasises the importance of a strong, experienced and knowledgeable secretariat, and mandates no expansion into new issue areas until additional staff capacity is achieved. This Action would allow the secretariat to expand to the size envisaged by the Strategic Plan, and allow it to implement effectively all of the capacity development initiatives foreseen in the Strategic Plan, which are designed to strengthen Eurodad and members’ capacity for coordinated advocacy at a European level and within global coalitions. It will also put in place the capacity and systems to significantly increase Eurodad’s fundraising capacity, to ensure that the funding from the Action is replaced by a diverse set of other sources by the end of the Action.

The following table summarises the work packages that have been designed to deliver each of the four results.

Result	How the related work packages will help deliver the result
<i>R1 – Joint issue-based strategies, including building necessary capacity of members, are agreed and implemented and help deliver policy change towards Eurodad goals</i>	<p>A1.1 – Advocacy Planning Coordination System⁴⁰ – will provide guidelines, and intensive training at regular strategic planning meetings involving all members and Target Groups to deliver a step-change upgrade to Eurodad’s methods of developing, agreeing and implementing joint issue-based strategies within the network and broader coalitions.</p> <p>A1.2 – Policy, Advocacy and Communications Toolkit – through bringing together best practices from across the network into a simple user-friendly web portal, and using this as the basis for training and model collective actions, this will help to improve the effectiveness of common strategies, to make sure they deliver the policy changes envisaged in the Strategic Plan.</p> <p>A1.3 – Strategies and Workplans for New Issue Areas – Guided by research and experts, a clear strategy and workplan for Eurodad in the three new issue areas (climate finance, investment agreements and financial sector</p>

⁴⁰ Please note: in the Eurodad Strategic Plan, this is called a Strategic Planning Coordination System. This has been renamed to avoid confusion as (a) the new name better describes the work package and (b) in recognition that having a work package with the words ‘Strategic Planning’ in it may cause confusion with Eurodad’s own Strategic Plan.

	<p>rules) will be developed, allowing members and other Target Groups to improve their collective working around common strategies, and build the coalitions necessary to deliver policy change goals.</p>
<p><i>R2 – The reach of the Eurodad network is extended to include members in all EU member states</i></p>	<p>A2.1 – Communications Outreach Plan – the production of high-quality awareness-raising and outreach material and its targeting at organisations, particularly those in the ‘missing’ EU member states, that have strong potential to become Eurodad members, will greatly increase awareness of Eurodad’s work, and create easy routes to participation in Eurodad-coordinated activities, building the strong connections that are a precursor to membership.</p> <p>A2.2 – New Members Recruitment Plan – Using existing networks and members with strong connections to target countries (organisations in the ten EU member states where Eurodad does not currently have a presence), Eurodad will identify target organisations and build connections, and convert these connections into membership through individualised capacity development programmes and involving the organisations in the work of the network, including the capacity development activities of this Action.</p>
<p><i>R3 – Effective global coalitions with joint strategies deliver results in at least two Eurodad issue areas</i></p>	<p>A3.1 – Joint Strategy Development with Global Partners – Eurodad will support the development of global strategies, in a collaborative, egalitarian manner, starting with two active networks that are already developing strategies and within which Eurodad plays a central role, the Global Alliance for Tax Justice and the Reality of Aid.</p> <p>A3.2 – Organisational Development Support for Debt and Development (DAD) networks – Eurodad will work with its sister networks in Africa, Asia and Latin America, to build their capacity, recognising the key role they play in many of the global coalitions through which Eurodad delivers change towards its Strategic Plan objectives.</p>
<p><i>R4 – The Eurodad secretariat expands to planned size, maintaining a highly motivated, experienced team delivering results and effectively supporting the network</i></p>	<p>A4.1 – Recruitment of New Staff – In order to deliver all the work packages detailed in this application, the Eurodad secretariat will need to expand as anticipated in the Strategic Plan.</p> <p>A4.2 – Planning and Evaluations – Effective planning and regular evaluation are vital for achieving all the results of the Action. Through a combination of upgrading Eurodad’s existing Monitoring, Evaluation and Learning (MEL) Framework (A4.2.7), which will include the development of specific methodologies and tools (involving external specialist input) to monitor and evaluate this Action, Eurodad will ensure that accountability and learning are maximised and that MEL capacity is strengthened both within Eurodad and among the Target Groups of the Action.</p> <p>A4.3 – Fundraising Pipeline Planning System – Eurodad will build on its structured approach based on a clearer ‘hit list’ of potential funders, backed by in-depth research, and a develop a clearer system for tracking and developing relationships with funders, coordinated by a new member of staff. This will allow the higher level of resources demanded by the Strategic Plan to be maintained, and ensure the sustainability of the Action, by gradually replacing the funding supplied by the Action with alternative sources.</p>

Detailed description of work packages

Below is a description of the various activity components of each of the work packages, grouped under the Result to which they most contribute. This section shows how the activities that make up each work package are justified in terms of achieving the objectives of the work package, which in turn help achieve the Results of the Action, as shown above.

RESULT 1 – Joint issue-based strategies, including building necessary capacity of members, are agreed and implemented and help deliver policy change towards Eurodad goals

Work Package A1.1 – Advocacy Planning Coordination System (Strategic Plan initiative B3)

As the Strategic Plan describes, Eurodad is always guided by effectively coordinated and well-targeted advocacy strategies, which in turn help to build strong and cohesive coalitions that can deliver advocacy results. A step-change upgrade to Eurodad’s methods of developing, agreeing and implementing common strategies within the network will be the impact of this initiative. This will result in common SMART⁴¹ objectives agreed by Eurodad members, and shared by other key Target Groups, on all seven Eurodad issues. This system will not only allow the Eurodad network to coordinate more effectively and inventively, but will also serve as a resource for other regional and global advocacy coalitions and networks. During the Action, at least 710 Target Group staff from at least 140 Target Group organisations will have their capacity built as a result of this work package.⁴²

This work package will be delivered by the Eurodad secretariat and two key affiliates, Both Ends and ActionAid. The project management system, rationale for affiliate selection, and their specific roles are covered in section 2.2.2.2.

During the first phase, best practices will be drawn together in Year One of the project into a set of Guidelines for Strategic Advocacy Planning (A1.1.1). These will be used by Eurodad secretariat staff, members and partners to improve both the results-focus of overall strategic planning, and the implementation of common activities, to help ensure that they are clearly targeted and contribute to achieving objectives. These will also be an important tool for induction of new staff from Target Groups, and to support training and development within the network and beyond.

- The Guidelines will be developed both through a thorough examination of best practices that exist within the network, and among allies, as well as through discussion and testing during issue-based strategic planning meetings (A1.1.2) during the second half of Year One of the project. The Guidelines will be finalised by the end of the year.
- The Guidelines will be based on the principles of the Eurodad network, as set out in the Strategic Plan, of being an inclusive coalition of the willing, focused on effective influencing to achieve common objectives. This means that Eurodad does not see building joint strategies and actions within the Eurodad network as the end in itself – but rather building powerful coalitions, working globally and with partners from other regions to change the policies and practices of multilateral institutions.
- Special attention will be given to integrating gender during the development of the Guidelines. This will be done using a twin-track approach, including both how to integrate gender into the common strategies themselves, and also how to integrate it into the process of designing strategies.
- The Guidelines will cover:

⁴¹ Specific, Measurable, Achievable, Relevant, Timed.

⁴² Capacity development sessions will be tied to 14 strategic planning meetings (350 staff trained, an average of 25 per session), two international conferences (140 staff trained at each, a total of 280), and one policy Forum (80 staff trained).

- *Common strategies* – how to develop a common strategic approach across a broad range of organisations that are able to exert influence in Europe and able to link other actors across the world to effect change at multilateral institutions.
- *Theories of change* – how to ensure that these have clear SMART objectives, are based on effective power-mapping, identification of key targets (those with the power to effect the change that is sought), and an understanding of how and why those targets will shift their positions, and what CSOs can do to influence them.
- *Coordinated actions at key moments that influence decision-makers* – both advocacy and campaigning actions, and coordinated media and communications work.
- *Integrating gender* to improve the effectiveness of strategic planning.

In addition, in order to show how the guidelines can be relevant to a broad range of CSOs, special modules on human rights and environmental sustainability will be developed within the Guidelines. Recognising the major environmental impacts of air travel, and the Strategic Plans' aim to make best use of improving video technologies, there will also be consideration of how to expand the dissemination work through using this technology, for example by conducting additional e-trainings.

The second phase, undertaken during Year Two of the project, will be one of intensive testing and evaluation. The Guidelines will be used to guide six strategic issue-based planning processes plus the Eurodad Policy Forum (A1.1.4),⁴³ which brings together Eurodad members and many other partners. They will also guide the coordinated actions aimed to influence decision-makers at a pan-European level undertaken as part of work package A1.2. At the end of the year, the Guidelines will be revised based on this experience of their use, and to reflect lessons learned in other areas of this Action and Eurodad's work. The lessons learned will be fed into the evaluation that helps the development of the new Eurodad Strategic Plan (A4.2.8).

In the third phase, during Years Three and Four of the project, Eurodad will focus on implementation, with the revised guidelines forming the basis for 12 issue-based strategy meetings (A1.1.2), and one international conference (A1.1.3). They will also guide the coordinated actions aimed to influence decision-makers at a pan-European level undertaken as part of work package A1.2. During this implementation phase, there will be a focus on outreach to other organisations and networks, including global coalitions, so that the impact of the guidelines can be magnified, and collecting feedback, so that a second revision of the Guidelines can take place at the end of the project (A1.1.6) ready to guide Eurodad and allies' work well beyond the end of the Action. The experiences and lessons learned during this phase will feed into the final evaluation (A4.2.10).

By the end of the Action, 56 Eurodad member organisations⁴⁴ and at least 84 other CSOs will participate in strategy meetings (A1.2.1, A1.2.2, A1.2.3) that use the Guidelines, helping to build the capacity of at least 710 staff members of these key targets for this Action.

Work package A1.2 - Policy, Advocacy and Communications Toolkit (Strategic Plan Initiative B2)

Given the strong focus of the new Strategic Plan on delivering advocacy results, it is crucial to devote efforts to ensuring staff across the network can learn from each other and from past successes, and that Eurodad can support capacity improvements across the whole network. The Policy Advocacy Toolkit will bring together best practices, and facilitate sharing of knowledge and ideas within and across the network. It will be the basis for trainings that will reach at least 1,125 staff in at least 120 target

⁴³ During odd years, Eurodad organises a major international conference in partnership with a member organisation. During even years, a smaller version of the conference, known as a policy forum, is organised in Brussels.

⁴⁴ Based on anticipated growth of the network into new countries.

organisations, including 56 members.⁴⁵ It will also guide 84 ‘model actions’ across Europe that will involve at least 2,940 staff in at least 180 target organisations, including 56 members.⁴⁶ Additionally, in order to create a multiplier effect beyond the immediate targets of this Action, it will be publicly available and widely disseminated to other CSOs in Europe and other regions that work on development issues.

This work package will be delivered by the Eurodad secretariat and two key affiliates, Both Ends and ActionAid. In addition, three other affiliates – OXFAM-IBIS, DDCI and Erlassjahr.de – will participate in the capacity assessment and audit of the network during Year One of the project. The project management system, the rationale for affiliate selection, and their specific roles are covered in section 2.2.2.2.

While work package A1.1 is essentially strategic in nature this work package is essentially tactical – focused on collating best practice methods, tools and initiatives that have the most impact on the policy-makers targeted.

During Phase One, in Year One of the project, a capacity assessment and audit will be conducted in order to:

- Collate all existing toolkits or similar guides that are used by Eurodad network members and allies, including any evaluations of these;
- Assess the needs of the network, and identify the priority areas for capacity development;
- Produce a plan for toolkit production, based on the above.

During Phase Two, in Year Two of the project, the Toolkit will be produced. The precise form of this Toolkit will depend on the capacity assessment, but it is predicted that an online interactive format is likely to be flexible enough to satisfy the various different needs that the Toolkit will address. However, there will also be a need for printing of short reference guides to the Toolkit, and a summary of the main elements, for use in future trainings. The basic idea of the Toolkit is that it will combine guidance on different types of tactics, approaches and methods that can be used, with a variety of good practice examples and case studies. The Toolkit will be designed as a living document, with new case studies and experiences added, based on the experiences of users of the toolkit, and the common actions undertaken as part of this project.

Initial drafts of the Toolkit will be tested during 28 coordinated actions aimed at influencing decision-makers at a pan-European level. These actions will be part of the issue-based strategies adopted by Eurodad, and so the Guidelines (work package A1.1) will also help to shape these. They may take a variety of forms – such as a coordinated advocacy push based on a common position paper, or a media plan focused on a key decision-making point. The Toolkit will be finalised based on lessons learned during this testing phase. It will also integrate gender issues throughout, and in order to show how the guidelines can be relevant to a broad range of CSOs, it will contain special modules on human rights and environmental sustainability.

During Phase Three, in Years Three and Four of the project, 25 capacity development trainings based on the Toolkit will be undertaken with the aim of influencing decision-makers. The practicality of the Toolkit will be demonstrated as it will guide 56 coordinated actions (A1.2.5), giving a total of 84 coordinated actions during the course of the Action. These will either be at pan-European level, or part of a global action designed with Eurodad partners. The Toolkit will be updated as these progress, based on feedback from trainings and the coordinated actions.

During the Action, trainings based on the Toolkit will reach at least 1,125 staff in at least 120 Target organisations, including 56 members⁴⁷, and the Toolkit will guide 84 ‘model actions’ across Europe

⁴⁵ 25 trainings with an average of 45 participants per training are planned. Please note that inevitably many staff will be involved in multiple trainings – the total figure does not refer to 1,125 separate staff members.

⁴⁶ 84 actions with an average of 35 staff involved in each. Please note that inevitably many staff will be involved in multiple actions – the total figure does not refer to 2,940 separate staff members.

⁴⁷ 25 trainings with an average of 45 participants per training are planned. Please note that inevitably many staff will be involved in multiple trainings – the total figure does not refer to 1,125 separate staff members.

that will involve at least 2,940 staff in at least 180 target organisations, including 56 members.⁴⁸ Multiplier effects will be ensured through widespread dissemination, as described in the Dissemination Plan in section 2.2.2.4 of this document.

Work package A1.3 – Strategies and Workplans for New Issue Areas (Strategic plan goals v, vi, vii)

The third work package to support Result 1 recognises that Eurodad has committed to working on three new issue areas in its Strategic Plan. Although several Eurodad members are already working on each issue area, this represents a key opportunity to greatly improve collaboration across European organisations to deliver on advocacy objectives. Guided by research and experts, a clear strategy and workplan for the Eurodad secretariat in the three new issue areas (investment agreements, climate finance and financial sector rules) will be developed. This will allow members and other Target Groups to improve their collective working around common strategies, and build the coalitions necessary to deliver policy change goals. Furthermore, the Advocacy Planning Coordination System (A1.2) and PAC Toolkit (A1.2) will reinforce the capacity of members and secretariat staff in these new work areas.

This work package will be delivered by the Eurodad secretariat and the following eight affiliates: ActionAid; Both Ends; IGO; Re:Common; WEED; Glopolis; SOMO and ODG. The project management system, the rationale for affiliate selection, and their specific roles are covered in section 2.2.2.2.

The first phase, during Year One of the Action, will begin with a scoping study for each issue area, plus a background briefing, written by one of the affiliates with the greatest level of expertise on the issue (A1.3.1). These will build on background briefing papers that Eurodad commissioned during the process of preparation for the Strategic Plan, which were written by experts, and identified the key debates, groups working on each issue, and potential objectives for Eurodad. The focus of the scoping study will be to update this analysis, but to focus on identifying the possible roles Eurodad could play as part of the collective effort by CSOs to achieve key policy changes in each area. The background briefings will provide in-depth background information and analysis to make sure decisions are made based on the best possible evidence.

The Terms of Reference for the scoping studies will be guided by three Issue Steering Groups (one for each issue) coordinated by the Eurodad Policy Advocacy Manager responsible for the issue. Each will include a core group of the members who are most active in each area, who have been included as affiliates in this project, and other experts and key allies. Partners from developing countries will be invited to take part (in line with work package A3.1). The Issue Steering Group will meet (A.1.3.2) to discuss the scoping study and advise on the implications for Eurodad's workplan in the area.

The second phase will begin with the agreement of a workplan for each issue area (A1.3.3). The workplan will be drafted by the lead Policy Advocacy Manager for each area, together with the new Policy Advocacy Officer hired for each new area (A4.1). The Issue Steering Group will comment on drafts of the workplan, the final version of which will be approved by the Eurodad General Assembly (A4.3.5) on the advice of the Eurodad board. The Eurodad workplan template will be used, which links the goals of the Strategic Plan to SMART annual objectives, with indicators of success, and the key activities to be undertaken to pursue the objective. A budget has been provided for collaborative work during Year Two of the Action, recognising that, as Eurodad begins work on a new issue, it will make sense to partner with organisations that have significant expertise and experience, and to make sure that support is given to proven existing methods of strategic coordination, including offering capacity to improve them if this proves necessary.

The third phase will focus on the agreement of a more comprehensive Eurodad Advocacy Strategy for work in each of the three new issue areas (A1.3.4), and will begin in Year Two and conclude in Year Three of the Action. Again the Issue Steering Group will advise on the development of each strategy,

⁴⁸ 84 actions with an average of 35 staff involved in each. Please note that inevitably many staff will be involved in multiple actions – the total figure does not refer to 2,940 separate staff members.

and will meet to discuss the first draft (A1.3.2). The strategies will benefit from the existence of the Guidelines for Strategic Advocacy Planning (A1.1.1). Given that global economic governance is a crosscutting priority of the Eurodad Strategic Plan, the strategies will prioritise examining how good governance should be integrated into strategic objectives. They will also explicitly state how gender has been integrated.

This key phase is deliberately timed to begin in Year Two of the project, to allow sufficient time for Eurodad staff to undertake the research necessary to set out the key issues in the area and the Eurodad recommendations, which will be published in an agenda-setting report (A1.3.6). The development of this thinking will be assisted by the organisation of an expert seminar in advance of drafting the report (A1.3.5). As with all reports, expert comments will be sought from a reference group (including members of the relevant Steering Committee), as well as peers within the secretariat. All reports are signed off by the Eurodad Director and a Eurodad board member. Finally, a second workplan (to cover work during Year Three of the Action) will be developed and agreed in consultation with the relevant Issue Steering Group, for approval by the Eurodad Board, and all Eurodad members at the General Assembly (A4.2.5) and then implemented.

RESULT 2 – The reach of the Eurodad network is extended to include members in all EU member states

Eurodad’s Network Strengthening Strategy⁴⁹ (Strategic Plan capacity development initiative B1) (NSS) sets out how the Eurodad secretariat will seek to develop and expand the Eurodad network, and its work with other networks and coalitions in order to better achieve the policy change goals of the Strategic Plan. The NSS builds on surveys and discussions with members and partners during the Strategy development process, and several discussions with Eurodad staff and the Eurodad board, and includes feed in from Eurodad members.

A capacity assessment undertaken to inform the NSS found that, after an adjustment of membership fees in 2011, the number of member organisations decreased from 58 member organisations to 47. This increased the stability of Eurodad’s core funding, but notably, several members who had not been very active left the network. However, as new members also joined to replace some of those that left, the number of countries involved in the network increased from 18 in 2009 to 20 now. Currently, Eurodad does not have members in eleven EU member states⁵⁰ and seven other European countries.⁵¹ An audit conducted in autumn 2015 revealed a good level of activity across existing members, with only one member classified as inactive, and the majority of countries having members active across two or more Eurodad issues. However, in nine countries Eurodad member activity is restricted to one of four of Eurodad’s issues.

Therefore, the work packages described above to achieve Result 1 are essential for maintaining the activity of existing Eurodad members, and strengthening it in all EU member states. However, until Eurodad extends to all EU member states, its ability to influence collective EU decisions will be weakened. To engage and attract members, Eurodad will implement two key work packages.

Work package A2.1 – Communications Outreach Plan

Eurodad will produce high-quality awareness-raising and outreach material and target organisations that are either not very active in Eurodad or related networks, not active on all issues, or are not yet

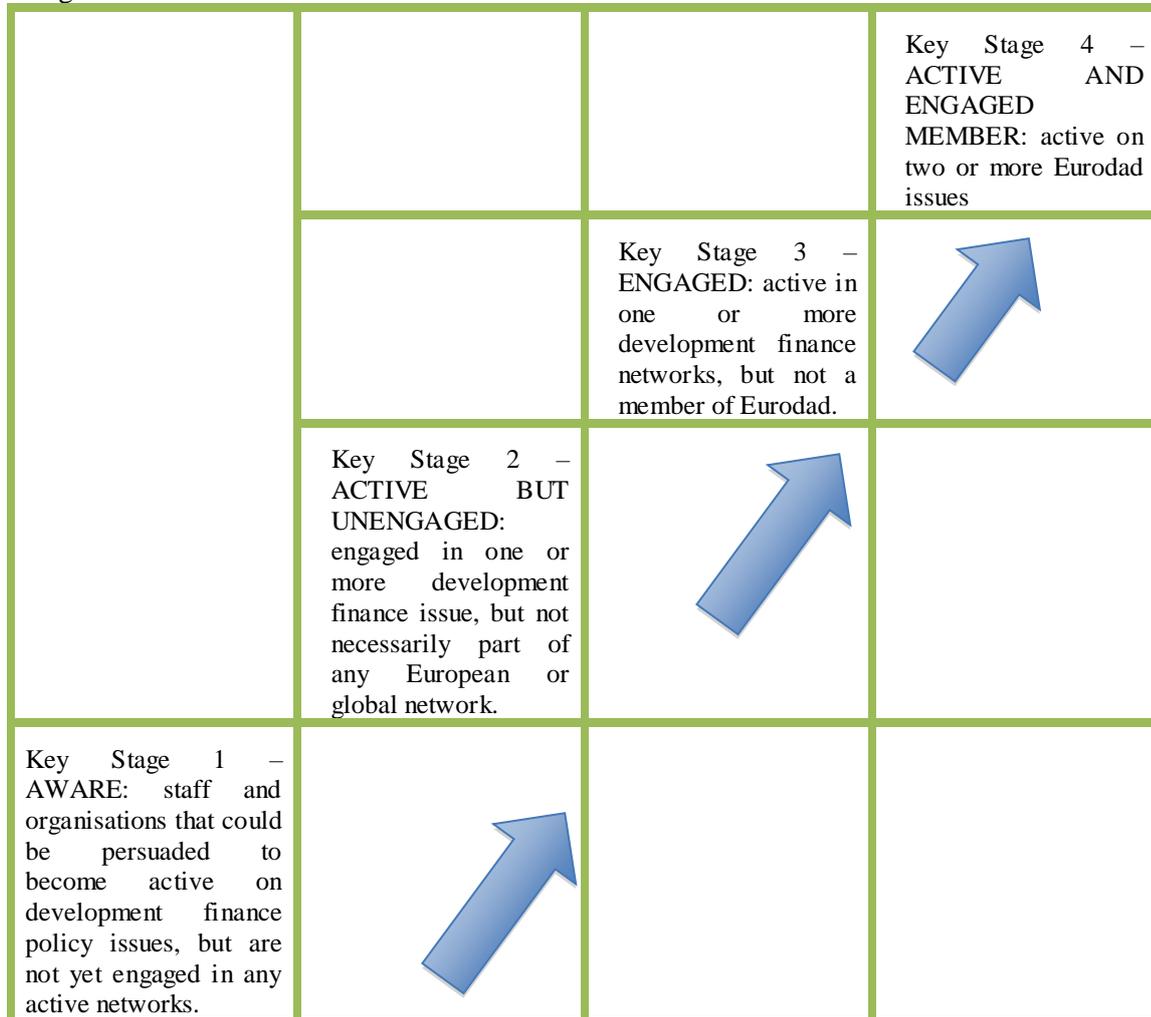
⁴⁹ This NSS is the first key ‘Advocacy and network strengthening’ capacity development initiative (number B1) from Eurodad’s Strategic Plan, and is intimately linked to the other two initiatives in this area, which are also part of the work packages in this proposal. A consultation draft of the NSS has been approved by the Eurodad board. After consultation with Eurodad members, this will be updated and finally approved by the board before the end of 2015.

⁵⁰ Bulgaria, Croatia, Latvia, Malta, Cyprus, Greece, Portugal, Romania, Lithuania, Estonia, Slovakia.

⁵¹ Albania, Bosnia, Turkey, Kosovo, Montenegro, Belarus, Iceland.

active, but could become so in the near future. Eurodad will actively create easy routes to participation and this will lead to a significant increase in the activity levels of previously ‘inactive’ organisations.

Rather like finding new funders, bringing new members into the network, and deepening the engagement of existing members, should be seen as a long-term process of relationship building. Therefore it can be seen as bringing NGO staff and then their organisations through the following key stages:



This work package will be delivered by the Eurodad secretariat. The project management system for this work package is covered in section 2.2.2.2.

This work package aims to improve outreach so that Eurodad reaches target organisations in stages 1 (aware), 2 (active but unengaged) and 3 (engaged, see above for more details), and encourages them to deepen their engagement, to move up the levels in the diagram above.

At the centre of this work package will be an upgrade of Eurodad’s communications outreach, to improve the targeting of the organisation’s existing communications products. The goal is to reach all members of Eurodad’s first two Target Groups, who are the policy, advocacy, communications staff, and senior managers in Eurodad members and other European CSOs working on development finance issues. By focusing on communicating with this ‘outer circle’ of potential future Eurodad members, and by understanding what interests the specific staff in these organisations, there will be an increase in their opportunities for interacting with Eurodad, for getting engaged in development finance policy networks, and therefore of eventually becoming targets of the New Members Recruitment Plan (work package A2.2).

The first phase will allow Eurodad to update the mapping and segmentation of its target audience, and improve its contact record management system, which is the underlying basis for effective, targeted

communications. This phase will begin with an update to our *Audience Survey* (Activity A2.1.1) – to better map Eurodad’s audience, and identify which products or services are of most interest to them. Eurodad has used its database of newsletter subscribers, and its listserv members as the basis for a quantitative survey, and a qualitative survey of a limited number of people identified as being in one of the first three Key Stages identified in the diagram above. These surveys will be reviewed and updated as necessary to allow Eurodad to: (a) better segment audiences into Key Stages, and identify which development finance policy issues are of interest to them; (b) get feedback on existing communications products to allow improvements, and also identify which are of most value to different segments of Eurodad’s audience; and (c) understand if there are new products that Eurodad’s audience would value.

As part of this review of its Audience Survey, Eurodad will examine in detail the data already collected about communications products, including its website, social media and newsletter analytics, and media monitoring. It will look at this from two angles: not only how Eurodad communicate with its audience, but also how the audience communicates with Eurodad, particularly when they use Eurodad materials in their own communications, reports, policy briefings and other public materials. Eurodad also intends to improve the tracking system used to monitor this.

The results of the Audience Survey review will help to update Eurodad’s *contact records management* (CRM)⁵² system (Activity A2.1.2), to allow better tracking of interactions with target audiences and to allow personalised communication. The first step will be to improve the segmentation of Eurodad’s audience based on: (a) the issues they are interested in; (b) their preferences for types and regularity of communications; (c) other important features, including the country they come from, the languages they speak and the networks they are already part of. The second step will be to define the key features needed from the CRM, and decide on which upgrades may be needed to the existing system in order to meet those.

The second phase will focus on a sequence of gradual improvements to Eurodad’s communications products, including introducing new ones if necessary, based on the initial feedback from the audience survey, and by continually testing the impact of Eurodad’s products. This will begin with an upgrade of Eurodad’s website (A2.1.3), as this remains the key repository of all the organisation’s public outputs. This will be based on an update to Eurodad’s communications strategy, which was approved by the board in 2016. Having undertaken newsletter reviews and upgrades twice during the last strategy period, Eurodad does not expect to need to change the software used, or the basic shape of the newsletter. Instead it will use the insights of the audience survey review to trial newsletter improvements (A2.1.4), tracking the impacts these have on different segments of the audience, and adopting successful improvements as a result. There will also be a review of social media use (A2.1.5), which currently focuses on Twitter, Facebook, and Linked In, and decisions will be made on any improvements to both formats and practices that may be needed in order to expand the scope of outreach to meet all the Targets.

The third phase, beginning in Year Two of the Action, will be to introduce new communications products, or methods of communicating with the Target audience. These will be of two types, and there is an example of each in the Indicative Plan (see section 2.2.2.3). First, Eurodad will improve ‘broad’ communications that go out to the target audience as a whole, or large segments of it. For example, feedback from members during the Strategic Review showed that they would appreciate more regular updates (A2.1.6) on the work of Eurodad as a whole, highlighting key achievements and activities, as well as changes in staffing and future plans. Second, there will be improvements in ‘narrow’ communication, targeted at segments of the target audience. Segmentation will be based on examining both issues that the targets are interested in and the level of detail they are interested in (which includes, for example, preferences for regularity of communication from Eurodad), and personalized, using the CRM upgrade. One product Eurodad will examine will be Activists Guides (A2.1.7) – including a survey of key topics within each issue, upcoming activities and notes on how to get involved, targeted at those who may only have interest in reading one short summarised output.

⁵² CRM is often used to refer to a ‘customer relations management’ system. Though the tools to manage this are similar, the commercial terminology does not fit with the nature of Eurodad as a CSO organization, hence the use of ‘contact records management’ instead.

Work Package A2.2 – New Members Recruitment Plan

The main targets for recruitment will be organisations in the eleven EU member states where Eurodad does not currently have a presence.⁵³ In addition, secondary targets will include strengthening the membership base in the two Central and Eastern European (CEE) countries with only one existing member,⁵⁴ and beginning to work with organisations in the four EU candidate countries where Eurodad has no members.⁵⁵ This means a total of ten primary target countries, and nine secondary target countries. Using existing networks and members with strong connections to target countries, Eurodad will: identify target organisations; build connections; and convert these connections into membership through targeted capacity development programmes and active involvement in Eurodad network activities, including the capacity development initiatives of this Action. Eurodad will proactively reach out to organisations that are natural Eurodad members, which share complementary goals, champion similar values, and have proven track records of effective policy and advocacy work. Targeting active and similarly minded organisations will ensure Eurodad’s identity and its reputation for effectiveness is maintained.

This work package will be delivered by the Eurodad secretariat and four key affiliates: Glopolis, Ekvilib Inštitut; Institute of Global Responsibility (IGO); and Demnet. The project management system, the rationale for affiliate selection, and their specific roles are covered in section 2.2.2.2.

The first phase, undertaken during the first half of Year One of the Action, will be a Mapping of potential members (A2.2.1). Given that the aim is to find organisations that are already active on development finance policy issues, have been active in the recent past, or are planning to be active, the starting point for this will be existing coalitions and networks. This will build on the mapping undertaken as part of an existing EC-funded capacity development project that Eurodad is part of, which is led by Christian Aid.⁵⁶ Some of these will be issue-based, such as Tax-Justice Europe, while others will be regionally or nationally based. In addition, Eurodad’s expansion into three new issue areas will also provide links to new organisations, and so mapping organisations working on new issues will be integrated into work package A1.3, in particular the scoping study (A1.3.1).

Given that seven out of eleven primary target countries and five out of six secondary target countries are in Central and Eastern Europe, the existing networks in this region that the affiliates are part of will provide another extremely valuable starting point. During the Mapping of potential members, information will be collected about each potential target based on a template, including their structure (for example, if they are a national membership based organisation, a national network, or an affiliate of an INGO), size, the issues they work on that overlap with Eurodad issues, and their capacity to influence decision-makers. This information template will be kept up to date throughout the Action, and integrated into Eurodad’s CRM system (A2.1).

The second phase will begin during the third quarter of the Year One of the Action, when the affiliates engaged in this work area agree a list of potential target organisations in each target country and a Target Outreach Plan to reach them (A2.2.2). This plan will be updated annually, making a total of 4 plans during the Action. The Plan will identify both the organisation and the key staff within them, and the methods of outreach to them. Most of these methods will be about making efforts to involve staff in Eurodad’s ongoing work processes, including the key initiatives of this Action. This means, for example, making sure that the personalised communication outputs of work package A2.1 are targeted

⁵³ Bulgaria, Croatia, Latvia, Malta, Cyprus, Greece, Portugal, Romania, Lithuania, Estonia, Slovakia.

⁵⁴ Slovenia, Poland. (Finland, Luxembourg and Austria are not a focus as the single members in those two states are themselves umbrella organisations). Italy and Denmark have one Eurodad member, but also have active ActionAid affiliates, which participate in Eurodad through the membership of ActionAid International.

⁵⁵ Albania, Republic of Macedonia, Montenegro, and Turkey.

⁵⁶ Action grant CSO-LA/2017/388-224: Citizens for Financial Justice– Led by Christian Aid

at them, that they are invited to strategy development sessions and trainings organised under A1.1, and to participate in the joint actions under work package A1.2.

During the first two years of the project, a senior member of Eurodad secretariat staff will conduct initial discussions with target organisations, together with affiliates, to see if (a) Eurodad membership might be possible, and (b) if not, what would make it possible.

Phase three, for those organisations that are interested in pursuing membership, will result in a tailored capacity development plan (A2.2.5) agreed with the target organisation, which may include a visit to the country if necessary (A2.2.4), or an in depth face to face discussion and planning session organized back to back with one of the capacity development opportunities in this Action (A1.1.2, A1.1.3, A1.1.4, A1.2.6). The intention is to provide some seed funding to kick-start work on Eurodad issues that allows them to engage more proactively with the network, and also help the organisation develop a plan to find alternative sources of funding. As this represents financial support to third parties, there will be a strict system in place to make sure the relevant rules are followed, which is detailed at the end of this section. We have set aside funds to allow small grants of EUR 20-60,000 per organization interested in joining Eurodad.

RESULT 3 – Effective global coalitions with joint strategies deliver results (policy change objectives) in at least two Eurodad issue areas

Eurodad’s Strategic Plan prioritises cooperation with partners from developing countries and seeks to work in partnership whenever possible by *“listening to and respecting their priorities, and trying to align ourselves to those”*. Working in partnership with global coalitions is an essential part of Eurodad’s purpose and theory of change, as set out in the organisation’s strategy:

“Eurodad’s focus is on strengthening the power of a network of European civil society organisations (CSOs), working as part of a global civil society movement, to push governments and powerful institutions to adopt transformative changes to the global economic and financial system. Change is needed at all levels: our focus at the regional and global level complements the national and local level work done by our members and allies.”

Therefore developing Eurodad’s capacity to have effective European-focused advocacy strategies must always be seen in the context of its work in global coalitions, in particular in partnership with allies from developing countries, including three sister debt and development (DAD) networks. To achieve this result, Eurodad will undertake the following work packages:

Work package A3.1 – Joint Strategy Development with Global Partners

Eurodad will support the development of global strategies, in a collaborative, egalitarian manner, starting with two active networks that have already developed strategies which they will be reviewing during the Action period – the Global Alliance for Tax Justice and the Reality of Aid. Furthermore, Eurodad will continue to build trust and create shared strategic approaches by inviting partners to participate in strategic planning processes under work package A1.1 and capacity development training (including A1.2.6), and ensuring that Eurodad participates in their strategic planning sessions or annual meetings when invited.

Eurodad will develop this work package with the support of the two active global development finance networks that Eurodad is part of – the Global Alliance for Tax Justice and the Reality of Aid – as well as sister Debt and Development networks.⁵⁷ In addition, several Eurodad members are also part of global affiliations – including ActionAid International and Oxfam International. Eurodad will ensure appropriate consultation and discussion with them.

In Year One of the Action, Eurodad will undertake a Scoping of potential partners (A3.1.1) to make sure that it is working with the full array of active networks from other regions in relevant issue areas, and that an up-to-date record of the people who work in them is maintained. This will be integrated

⁵⁷ The African Forum and Network on Debt and Development (Afrodad); The Latin American Network on Debt, Development and Rights (Latindadd); Asian Peoples’ Movement on Debt and Development (APMDD).

into Eurodad's Contact Records Management system (A2.1.2) so that they can be targeted with appropriate communications.

Eurodad will also continue to build trust and shared strategic approaches by inviting partners to participate in strategic planning processes and capacity development initiatives (as noted above), and ensuring that Eurodad participates in their strategic planning sessions or annual meetings when invited (A3.1.2).

Work package A3.2 – Organisational Development Support for Debt and Development (DAD) networks.

Eurodad will work with sister networks to build their capacity, recognising the key role they play in many of the global coalitions through which Eurodad delivers change towards Strategic Plan objectives. Recognising that Eurodad cannot make commitments on behalf of these sister networks, the focus of this work package is on maintaining the essential system for communication and discussion that will deliver continual improvement, with buy-in from the sister networks.

During the previous strategy period, the DAD networks established a practice of monthly teleconferences at Director level to help each other with organisational development, and to help ensure that joint projects were well managed. These were extremely useful but could be improved if one DAD had resources to provide a secretariat, rather than relying on sharing the responsibility across all organisations. Therefore, this work package is designed to ensure the essential communication that facilitates the joint working and delivers the results that all the DAD networks wish to achieve. Eurodad will take responsibility for ensuring that the monthly teleconferences (A3.2.1) - ten per year, allowing for breaks in summer and winter - take place, and provide secretariat support to undertake preparatory activities, take minutes and follow up on joint action points.

The structure of the teleconferences will follow the standard pattern developed during the previous strategy period, with a fixed agenda of: (a) organisational updates, including staffing changes; (b) future projects and fundraising; (c) existing projects, focusing on resolving any issues that are blocking progress, and ensuring monitoring and evaluation; and (d) joint capacity development initiatives.

It is expected that the following outputs will arise from this work package. However, as these will be agreed iteratively with partners, rather than planned at the outset, the exact form will depend on areas where common agreements can be reached:

- Concept notes for joint funding bids;
- Evaluation of joint projects, and plans for future improvements;
- Staff mentoring programmes, exchanges, or other forms of learning from each other.

Please note that the work package itself is restricted to maintaining the regular communication that is essential for cooperation to flourish, and does not deliver the above initiatives, which will be delivered from existing resources or from additional resources raised during the course of the Action.

Result 4 – The Eurodad secretariat expands to planned size, maintaining a highly motivated, experienced team delivering results and effectively supporting the network

This result underpins all the others, as the work of the secretariat is essential for helping the network to expand operational and institutional capacities to coordinate advocacy and campaigns at European level, to improve its representational capacity, and to make sure that the network is integrated into global campaigns.

Work package A4.1 – Recruitment of New Staff (Strategic plan initiative C1).

In order to deliver all the work packages detailed in this application, the Eurodad secretariat will need to expand as anticipated in the Strategic Plan. The overall work of this Action will be overseen by a

Vice-Director leading Eurodad's work on policy, advocacy and communications, which is at the core of all the work packages proposed here. The project management for many of the key workpackages will be undertaken by a new position of Network Development Officer. In order to develop Strategies and Workplans for New Issues (work package A1.3), Eurodad will hire three new Policy and Advocacy Officers to develop Eurodad's work on new issues. A new Communications Officer will focus on work package A2.1. Finally, a Fundraising Coordinator will be needed to help deliver work package A4.3 and ensure the increased resources required to maintain the secretariat's expansion.

In order to deliver all the work packages detailed in this application, the Eurodad secretariat will need to expand as anticipated in Strategic Plan capacity development initiative C1. The organisational structure and team are set out in a table in section 2.2.2.2 (Methodology). In essence, however, Eurodad will recruit the additional ten staff foreseen in the Strategic Plan in the following order:

- i. *Vice-Director* – it will be critical to select a high-quality candidate early, as this role will play a vital role in the implementation of the Action, overseeing all the major policy advocacy and campaigns initiatives.
- ii. *Network Development Officer* – who will provide project management support for the Action as a whole, and lead coordination on a number of work packages (see table below).
- iii. *Fundraising Coordinator* – This person will also help provide project management support for the Action as a whole. Eurodad has chosen to select this role early, not only because they are leading on one part of the Action (work package A4.3) but also because building the pipeline of new funders that will gradually replace the funding from this Action (see section 2.2.2.4 Sustainability) will take time. In addition, the work they take on will free up time for the Grants, Finance and Office Manager, who is important for the implementation of several of the work packages, and the Director, who plays a key quality assurance role in the project. Both these posts will continue to be very involved in fundraising, but this post will allow senior management staff to focus on the most strategic aspects, rather than also having to engage in day-to-day activities, which is often the case in the current staffing structure. In addition, the new Vice Director will add senior management capacity to support fundraising.
- iv. *Communications Officer* – it will be important to get this position in place early, not just to free up the time of the Communications Manager to engage in relevant work packages, but also in recognition of the fact that, once Eurodad starts working on new issues, and expands the number of Policy and Advocacy Officers, they will need communications support. In essence, an early start will allow the Communications Officer time to 'learn the ropes' before this increase in demand occurs.
- v. *Policy and Advocacy Officers on new issues (3)* – these will be recruited so that they can start after the relevant PAMs have conducted the scoping study for each new issue (A1.3.1), and the background papers for the Issue Steering Group meetings for each issue (A1.3.2) have been produced. This will allow the new PAO to begin work with a clear idea of the main elements of their workplan for their first year in the job (A1.3.3).

As the Annex to the Strategic Plan sets out, during the last strategy period Eurodad invested heavily in ensuring a robust recruitment process, which led to the selection of high-quality staff. This has paid off: Eurodad now has an experienced, stable, motivated and results-focused team.

Eurodad has an extensive advertising and outreach system, which ensures both high numbers and high quality of applicants. The selection process for every staff member involves the Director, with board members participating for all senior staff vacancies. Candidates must do well in a series of interviews and tests, designed to examine their relevant experience and skills against tightly defined job descriptions. The basis of Eurodad's ability to attract excellent candidates – which the Strategic Plan emphasises as being central to success – is the good reputation and results-focused nature of the organisation. In addition, job descriptions, salary scales and benefits were updated to competitive levels for all grades of staff during the last strategy period, on the basis of externally conducted job market reviews, benchmarking jobs against similar roles in Brussels.

Work package A4.2 – Planning and Evaluations

Effective planning and regular evaluation are vital for achieving all the results of the Action, and Eurodad has considerable experience of planning and evaluating multi-partner European Commission grants.⁵⁸ The planning and evaluation for this Action has been integrated with Eurodad's overall planning systems, which will benefit from the Guidelines for Strategic Advocacy Planning (A1.1.1). In addition, the nature of Eurodad, as a member-owned organisation, where all workplans are approved by the General Assembly on the advice of an elected board, means it will be vitally important to ensure the planning and evaluation of this Action is incorporated into Eurodad governance systems. This will also help to ensure that all Eurodad members, who are key targets of the Action, have considerable support for, and investment in, the Action. This will help to strengthen the representational capacity of the network, including the role and responsibilities of Eurodad network members, in line with the overall objectives of this Action.

First, Eurodad will ensure careful planning and evaluation of this Action. Annual project planning meetings (A4.2.1) involving secretariat staff and the key affiliates, followed up by quarterly teleconferences (A4.2.2) will ensure that this Action is tightly managed. The first project planning meeting, to be held soon after the award of the grant, will include establishing the basic Monitoring, Evaluation and Learning (MEL) framework for the Action – based on Eurodad's existing systems, supplemented by insights and improvements suggested by Affiliates, who collectively have very significant experience in this area. This framework will be aligned with project management and reporting processes, and will be updated after Eurodad completes a review of its MEL framework during the first year of the Action (A4.2.6). A Communication Plan (A.4.2.11) will be prepared early in Year One of the Action, and updated annually, including by summarising achievements. This will be reported to the Commission and will be robust, detailing the external communication activities that will take place at key stages in the life of the action yet flexible enough so as to capitalise on any unexpected opportunities to publicise the impact of the Action. It will be integrated into dissemination plans attached to specific work packages (such as A1.2.3).

Eurodad has considerable experience of this kind of grant management, which is based upon:

- a. A clear division of labour for each project, based on this Action description, but with an inception meeting (the first meeting under A4.2.1) setting out in clear detail what each Affiliate must deliver, with deadlines, to be agreed in a detailed memorandum of understanding with each affiliate. This will agree more detailed indicators and targets along with sources and systems for monitoring progress *at the Activity level* and to name the Affiliate responsible not only for delivery but also for gathering and recording of monitoring data. The logframe for the project will be turned into a Living Logframe – a spreadsheet tool which will use a set of trackers to gather all quantitative and qualitative data at the Activity and Output level to feed into Eurodad's reporting to the EC and also as a project management tool to monitor progress and aid communication among partners. This will feed into to the strategy renewal evaluation (A4.2.8) and the final evaluation (A4.2.10), along with a range of other sources.
- b. Good preparation of meetings (A4.2.1) and teleconferences (A4.2.2), with a clear agenda, background documents circulated in advance, and regular communications with project partners between times.
- c. Rapid and consistent follow up, to ensure that actions are completed and all partners know their responsibilities.
- d. Integration of evaluation into day-to-day work, with project staff encouraged to share feedback (both internal and external) and raise issues for further discussion in advance, with tools and systems provided to support this (A4.2.7) and alignment with performance management procedures, including regular 1:1s and performance reviews, which are integrated into the MEL framework (A4.2.7). The Vice-Director will be responsible for tracking the risks identified in the Risk Management Plan (set out in section 2.2.2.4) and bringing any important or urgent issues to the regular project management teleconferences (A4.2.2). In addition this Risk Management Plan will be reviewed and updated at the annual project planning and evaluation meetings (A4.2.1).

⁵⁸ These are detailed in the FPA application.

Second, given the importance of the Action to delivering Eurodad’s overall work, as set out in the Strategic Plan, reviews of implementation of the Action will be integrated into Eurodad’s staff Away Days (Activity A4.2.3).

Third, improving monitoring, evaluation and learning (MEL) is a key part of the Strategic Plan. A new MEL Framework has been developed, which will impact all of Eurodad’s work. This will be upgraded (A4.2.7), as Eurodad has already invested in developing MEL systems, including those that have been used in the major EC-funded multi-country projects that Eurodad has been leading.⁵⁹ In particular, the basic structure of existing MEL framework will be retained, which is to focus on measuring and evaluating impacts at two levels:

- Direct impacts on Target Groups – these provide a good degree of certainty about direct, verifiable impacts of Eurodad’s work.
- Impacts on the policy changes that are foreseen in the Strategic Plan – these are inevitably harder to link verifiably to Eurodad’s work, but provide the main indication of whether Eurodad is achieving its ultimate goals.

Eurodad recognises the value of effective MEL and its contribution towards the long-term success and sustainability of the network. Eurodad commissioned an external expert review of the MEL proposals contained in this Action and the Strategic Plan, which confirmed the soundness of Eurodad’s overall approach, and made suggestions for strengthening it, which have been included in this Action.

Insights from the Advocacy Planning Coordination System (A1.1), Policy Advocacy and Communication Toolkit (A1.2), and the Audience Survey (A.2.1.1) will also be fed into the update of the MEL Framework. An externally guided MEL Framework consultation (A4.2.6) will include getting feedback from all Target Groups. An external consultant will be hired to design and manage this activity, though the final MEL Framework will be approved by the Eurodad Board. This external guidance will be important for two reasons. First, it will allow Eurodad to benefit from in-depth expertise on learning and evaluation. Second, it will provide an impartial coordinator that can facilitate inputs from Eurodad members and other Target Groups, to ensure that the final framework will be of genuine use for these key stakeholders.

Fourth, the participation of the Target Group of Eurodad members is ensured as all Eurodad workplans are approved by the Eurodad General Assembly and these and all other Strategic Plan initiatives are approved and overseen by the Eurodad Board, which is elected by members. The Eurodad General Assembly meets annually, normally in June (A4.2.5), and the Eurodad Board schedules a face-to-face meeting (A4.2.4) in the late autumn, which is the best time to reflect on achievements of the current year, and discuss plans for the coming year.

Fifth, the Strategic Plan will have a Strategy renewal evaluation (A4.2.8), which will include an external evaluation of Eurodad’s progress in delivering the Strategic Plan. The evaluation experts that undertake this review will be carefully selected by competitive tender. This external evaluation will include soliciting feedback from members and other key Targets of the Action. This review will feed into Strategy Renewal Away Days (A4.2.9) that will involve the Eurodad Board and partners from developing countries, which will develop proposals for a new Strategic Plan, to be approved by the Eurodad General Assembly in 2020. Finally, a second external evaluation will be carried out (A4.2.10) mid-term of the Strategic Plan period, which falls together with the end of this Action.

Work package A4.3 – Fundraising Pipeline Planning System (Strategic Plan initiative C2)

In 2015, an external consultant conducted a full-scale review of Eurodad’s fundraising system, recommending the adoption of a more structured approach based on a clearer ‘hit list’ of potential funders, backed by in-depth research, and a clearer system for tracking and developing relationships with funders, coordinated by a dedicated member of staff. This best-practice approach has been agreed

⁵⁹ *Development finance for equitable growth: enhancing dialogue between EU civil society and decision-makers (2012-2015)* and *Addressing illicit capital flight for policy coherence for development (2013-2015)*

by the Eurodad Board and will be upgraded by this Action. After Eurodad has hired a Fundraising Coordinator (A4.1.2) this system will be operationalised.

In 2015, Eurodad commissioned external consultants to review its fundraising systems and strategy, and make recommendations for improvement, which were subsequently reviewed by Eurodad staff, and approved by the Board. Two central improvements are at the heart of the new system, and this Action will allow them to be upgraded in the following ways.

First, a greater clarity in roles within the team, with the hiring of a new Fundraising Coordinator (A4.1.2) providing both the additional capacity needed given the expansion of the team and budget foreseen in the Strategic Plan, and to ensure that key elements of fundraising, including funders' research, contact management and follow up, and proposal drafting and submission are well coordinated. This will allow other staff to focus on their core roles to maximise their impact in their own positions, in particular to allow the Director and Vice-Director to concentrate on maintaining strong relations with donors and on quality assurance, in their role as 'reassurers' – making sure that donors can see that Eurodad is well managed and results-focused.

Second, improvements to the pipeline management system (A4.3), which divides a hit list of funders (those whose objectives and funding opportunities are a good match with Eurodad's objectives and activities) into the following four categories:

- i. **Research** (including identifying funders that are a good match for Eurodad, assessing likelihood of support, and finding appropriate projects, based on a suite of pre-prepared concept notes outlining Eurodad plans in unfunded areas).
- ii. **Initial contact** (raising awareness of Eurodad, and ensuring sustained interaction that allows the funder to assess Eurodad).
- iii. **Negotiation** (dialogue with the funder over possible support. For some funders, with open calls for proposals, this may be the first stage of the pipeline).
- iv. **Ask** (Submit proposal after invitation).

Eurodad has a strong 'mature' pipeline (in stages iii and iv), which is why it is confident of funding the parts of the Strategic Plan that are not covered in this Action. However, a much broader 'young' pipeline (in stages i and ii) will be needed, particularly as the plan would be to progressively reduce the proportion of total Eurodad funding supplied by this Action (if successful) and replace it through a mixture of increased support from existing funders and bringing on board new funders. As the risk management framework (see section 2.2.2.4 below) sets out, there is always a risk that changing donor priorities could reduce Eurodad's funding base, which is another reason why a broad pipeline is needed at each of the above stages.

Eurodad will update the research it has conducted into its hitlist of donors, updating the Research Summary for each (A.4.3.1). A template of key information required for a good summary was produced by the fundraising consultants, along with guidance on how to conduct research. Parallel to this, when necessary, Eurodad will complete or update Concept Notes (A.4.3.2) for each work area, and each cross-cutting issue, setting out objectives and plans for the coming years. These are developed to form the basis of initial discussions with donors – and hence are developed when sufficient contacts have been made. Again, Eurodad prepared a template for these, following the consultants' advice on the key questions asked by all donors. Phase 1 will also include plan for relationship management (A4.3.3).

Monthly reviews of progress (A.4.3.4) are already standard practice for the Senior Management team, as Eurodad already has contact with a number of hit-list donors. This practice will continue throughout the Action, with the Fundraising Coordinator taking over responsibility for organising these.

Financial support for new members (third parties)

This Action proposes a limited amount of financial support to third parties directed at supporting clearly defined New Member Capacity Development Plans (A2.2.5). This is to recognise that to meet Result 2, and extend the network to include members in all EU member states, Eurodad will need to make sure that these new members can participate actively in the network, which may require strengthening their capacity. Eurodad will not define in advance the precise nature of the support, as this will depend on the new members, but it will be from the types of activities listed below.

The maximum amount of financial support per new member (third party) that will be agreed for each capacity development plan is EUR 60 000, and the minimum is EUR 20,000, to ensure the funding is large enough to make a difference, but not so large that it distorts the recipients priorities – the motivation for joining must be non-financial. An envelope of EUR 540,000 has been set aside, meaning that up to 27 capacity development plans can be supported financially, depending on the level of interest from qualified potential members, though the actual number is expected to be less, as some potential members may require the maximum amount of support.

The following will guide the award of financial support.

1. Objectives and results to be obtained with the financial support:
 - a. Objective: to ensure that new members can participate actively in at least one issue-area of the Eurodad network, and therefore help advance the overall results and specific objectives of the Action.
 - b. Result: New member works to advance the objective of at least one common strategy, and takes part in at least ten Joint actions across Europe based on common objectives (A1.2.5).
2. Types of activities eligible for financial support will be from the following fixed list:
 - a. Human Resources support to strengthen (a) advocacy; (b) communications; (c) research and analysis; (d) project management; or (e) grant management.
 - b. Publications or communications materials, such as report printing or design.
 - c. Travel and per diems for advocacy or strategy development purposes.
 - d. Training costs for staff in the organisation.
3. Categories of persons which may receive financial support: not for profit, civil society organisations with clearly established governance systems. Legal personality of participants, is a condition to the Action grant, so will also be the case for subgrantees.
4. Criteria for selecting the entities and giving the financial support:
 - a. Proven capacity in engaging in advocacy, communications or campaigns activities on a development finance related topic.
 - b. Based in an EU member state or candidate country in which the Eurodad network is not yet present, or where the network is weak.
 - c. Detailed capacity development plan developed by the candidate organisation which will be scored against the following criteria, with candidates required to score an average of 4/5 for each item.
 - i. Relevance of the capacity development plan
 1. How relevant is the plan to the priorities of Eurodad's Strategic Plan? How clearly are the capacity gaps identified? How relevant is the plan to the capacity gaps?
 2. Effectiveness and feasibility
 - a. Are the activities proposed appropriate, practical, and consistent with the objectives and expected results?
 - b. Is the plan clear and feasible?
 - c. Are there verifiable indicators of the outcome of the plan?
 3. Sustainability
 - a. Is the plan likely to have a tangible impact on the capacity of the beneficiary?

- b. Are the expected results sustainable? How will active participation in the Eurodad network be continued after the end of the financial support?
 - 4. Budget and efficiency
 - a. Are the activities appropriately reflected in the budget?
 - b. Is the ratio between the estimated costs and the expected results satisfactory?
- 5. Criteria for determining the exact amount of financial support for each third entity will be based on the quality of the Capacity Development Plan, with an average score of 4 out of 5 for each element listed above being required. Support would be provided for real costs only, based on an approved budget, following the same eligibility criteria as in the grant contract.
- 6. The maximum amount which will be given is EUR 60,000, and the minimum amount is EUR 20,000, allowing for between 9 and 27 plans in total, depending on the level of interest, and the ability of organisations to match the selection criteria above.
- 7. System of control set up to verify the eligibility of costs - this will use Eurodad's existing systems which are tightly controlled, and tested over a number of multi-partner grants, including several from the European Commission. This will mean that:
 - a. Eurodad will provide an initial training on financial management, monitoring and evaluation and EC requirements, and will continue to support improvements through ongoing coaching.
 - b. Quarterly progress reports on indicators and expected results and expenses, monitored by the Eurodad grant and finance team.
 - c. Annual narrative and financial reports will be included in Eurodad own reports to the EC and subject to the same expenditure verification by Eurodad auditors.

2.2.2.2 Methodology

Organisational structure and team

The senior management lead for the Action will be the Eurodad Vice-Director (VD), Policy, Advocacy and Communications, who will be responsible for ensuring a focus on delivering the results of the Action. This is the appropriate senior management lead, as the Action focuses on policy, advocacy and communications, and will be implemented largely by the team led by the Vice-Director.

Each work package will be coordinated by a designated project manager from the secretariat, as shown in the tables below, with a designated implementation lead for each activity. In addition the role of quality assurance (QA) has been identified for each work package. This person is responsible for both giving advice and guidance throughout, as requested, and for assuring that the final products meet Eurodad's high-quality standards. The Director will take responsibility for overall Quality Assurance of the Action.

In the table below, grey font indicates areas that are not a focus of this Action. The following acronyms are used:

- CM (Eurodad Communications Manager)
- CO (Eurodad Communications Officer)
- Dir (Eurodad Director)
- FC (Eurodad Fundraising Coordinator)
- GFOM (Eurodad Grants, Finance and Office Manager)
- NDO (Eurodad Network Development Officer)
- PAM (Eurodad Policy and Advocacy Manager – there are four in Eurodad)
- PAO (Eurodad Policy and Advocacy Officer)
- VD (Eurodad Vice-Director)

Results Management Framework Objective	Lead	QA	Relevant Work Packages	Affiliates
<i>Issue areas (the Strategic Plan lists SMART goals for each)</i>				
i. Tax Justice	PAM 1	VD		Not a focus of this Action
ii. Ending Debt Crises	PAM 2	VD		
iii. Effective Aid	PAM 3	VD		
iv. Publicly-backed Private Finance	PAM 4	VD		
v. Investment Agreements	PAM	VD	A1.3	SOMO, Re:Common, ActionAid, Both ENDS, IGO
vi. Climate Finance	PAM	VD	A1.3	Both ENDS, Glopolis, Re:Common
vii. Financial Sector Rules	PAM	VD	A1.3	WEED, SOMO, Re:Common, Glopolis, ODG
<i>Organisational Development Objectives</i>				
<i>A. Research and Analysis</i>				
A1. Research Guide	Completed			Not a focus of this Action
A2: Rapid, Robust Reaction System	Dir	VD		
<i>B. Advocacy & Network Strengthening</i>				

B1. Network strengthening strategy	NDO (A2.2, A3.2) CO (A2.1)	VD (A2.2, A3.2) CM (A2.1)	A2.1, A2.2, A3.2	Ekvilib Inštitut, Glopolis, IGO, Demnet
B2. Policy Advocacy & Communications Toolkit	NDO	VD	A1.2	ActionAid, Both Ends, Erlassjahr.de, DDCI, IBIS, Glopolis
B3. Strategic Planning Coordination System	VD	Dir	A1.1, A3.1	ActionAid, Both Ends
<i>C. Eurodad secretariat</i>				
C1. Organogram Objective	GFOM	Dir	A4.1	No affiliates
C2. Fundraising Pipeline Planning System	GFOM	Dir	A4.3	No affiliates
C3. Systems & Procedures Intranet*	GFOM	Dir	A4.2	No affiliates
* This project will support part of this – the Monitoring, Evaluation and Learning Framework				

Role of members

Eurodad members are a key Target Group for this Action, and will participate actively in all of the work packages of the Action, as summarised below, by work package:

- A1.1 – *Advocacy Planning Coordination System* – in addition to the 13 members that are affiliates, and 25 that are associates, all members will participate actively in this work package through participating in several issue-based strategic planning meetings (A1.1.2), Eurodad conferences (A1.1.3) and the Policy Forum (A1.1.4). The extent of participation for each member will depend upon the number of Eurodad issues the member works on. At least 280 participants from Eurodad member organisations will take part in capacity development activities linked to these events. In addition, as highlighted above, the Guidelines for strategic advocacy planning (A1.1.1) are intended to be a relevant resource for all members, who will receive a copy, and the offer of follow up if they are interested in using them in their own internal planning systems in the future.
- A1.2 – *Policy, Advocacy and Communications Toolkit* – Members will play an active role in the joint actions across Europe based on common strategies (A1.2.5), leading on the implementation of actions at the national level. Again, different members will participate in different actions depending on the issues that the member is working on. At least 840 participants from Eurodad members will take part in joint actions in Europe based on common strategies (A1.2.5). In addition, as highlighted above, the Toolkit is intended to be a relevant resource for all members, who will receive a copy, and the offer of follow-up, if they are interested in using it as an internal resource, training or induction guide.
- A1.3 – *Strategies and Workplans for New Issues* – Members who are active on these issues will be invited to participate in the Issue Steering Group (A1.3.2), in addition to the affiliates noted below, who have committed to playing an active role. In addition, as Eurodad develops a clear and active strategy in each issue area, it is likely that an increasing number of members may begin to work on each issue. Eurodad strategies for new issues (A1.3.4) will identify how best to make use of members’ capacities, and Eurodad workplans (A1.3.3 and A1.3.5) will include activities that will involve members, such as joint outputs, coordinated actions or joint seminars.
- A2.1 – *Communications Outreach Plan* – Eurodad members are active users of Eurodad communications products but also contribute to many of them, by providing peer reviews for articles and reports, for example. They will be a key Target audience of the new outreach plan, with the CRM system allowing them to receive information that is tailored to their needs and preferences.

- *A2.2 – New Members Recruitment Plan* – the key members with the best connections in many target countries have been included as affiliates, to recognise the major role they will play in implementing this work package. However, other members also have connections with specific organisations, or through relevant networks they are part of, for example, church-based networks of CSOs. The connections between members and target organisations (A2.2.2) will be identified, so that members can support the expansion of the network, for example, by facilitating introductions. In addition, all new members must be elected by the General Assembly of all Eurodad members (A4.2.5).
- *A3.1 – Joint Strategy Development with Global Partners* – Eurodad members are active in several global coalitions of relevance to this Action, including the Global Alliance for Tax Justice, and the Reality of Aid. Some also provide funding to support global coalitions. However, a key added value of membership for many members is that the secretariat has excellent connections with such coalitions and partners, attends the key strategic discussions (A3.1.2) and can ensure that joint positions and common strategies are negotiated that enhance and respect the common positions and strategies of the Eurodad network. In addition, the inclusion of key global partners in Eurodad-organised strategic planning processes under work package A1.1 gives another opportunity for Eurodad members and other key targets present to interact with, learn from and share positions with global partners directly.
- *A3.2 – Organisational Development Support for DAD networks* – Several Eurodad members provide funding support for Eurodad’s sister organisations. In addition, the Eurodad secretariat will continue to play a role under work package A3.2 in linking sister organisations with Eurodad members in order to help them make connections at a variety of levels, from joint policy and advocacy initiatives, to fundraising support.
- *A4.1 – Recruitment of New Staff* – Eurodad Board members, elected by Eurodad members, play a role in recruiting senior positions, and will sit on the interview panel for the Vice-Director position.
- *A4.2 – Planning and Evaluations* – All workplans are approved by the Eurodad General Assembly of all members (A4.2.5). In addition, the evaluations that are planned under this Action (A4.2.8 and A4.2.10) will involve members in a process of joint reflection and consultation, and the MEL Framework (A4.2.7) will explicitly focus on how to ensure continued involvement of members in assessing progress.
- *A4.3 – Fundraising Pipeline Planning System* – Eurodad’s approach to fundraising has two critical roles for members. First, they often act as ‘introducers’ – making initial contacts, or strengthening existing contacts between funders that they have special connections to. For example, Eurodad’s Norwegian members were instrumental in helping secure a major grant for the DAD networks, including Eurodad, from the Norwegian Agency for Development Cooperation (Norad). Second, Eurodad members have been partners in several joint projects in recent years. Eurodad members that are elected to the Board advise the organisation on fundraising, including by linking secretariat staff to advice and assistance from professional fundraisers from within their organisations. Finally, Eurodad can also act as a conduit for funding for member organisations, and one of the new Fundraising Coordinator’s priorities in developing the Fundraising Pipeline Planning System (A4.3) will be to identify how to do this strategically to strengthen the network as a whole.

Role of affiliates

All Affiliates are Eurodad members, chosen after discussions with all Eurodad members interested in participating most actively in the Action, and selecting those that have deep and relevant experience for key work packages, and agreeing the specific role of each affiliate.

Implementation Groups will be organised for each work packages that will provide advice to the nominated project manager, and approve key outputs.

The staff members that are most involved in the Action (from the secretariat and relevant affiliates) form an Action Steering Group to provide advice to the Vice Director (senior management lead) and Network Development Officer (overall project manager) and sign off key planning outputs.

A summary of the roles of each affiliate in the Implementation Groups is provided in the following table, with a detailed description of each affiliate following.

Work package	Affiliates in Implementation Group + their roles
<i>A1.1 Advocacy Planning Coordination System (APCS)</i>	<p>ActionAid and Both ENDS will sit on the APCS Implementation Group, and will be very actively engaged during Years 1 and 2 of the Action, when the Guidelines for good strategic planning (A1.1.1) are developed. They will play a key role in developing this resource, drawing on their extensive experience. In Year Two of the project, they will play a leading role in implementation in several of the issue-based strategic planning meetings (A1.1.2) and will, together with the secretariat, use this experience to contribute to the revision of the Guidelines for good strategic planning (A1.1.5).</p>
<i>A1.2 Policy, Advocacy and Communications Toolkit</i>	<p>ActionAid, Both ENDS, OXFAM-IBIS, Erlassjahr.de, DDCI and Glopolis will sit on the PAC Toolkit Implementation Group.</p> <p>ActionAid and Both ENDS will be major implementation partners, involved in all activities during Years 1 and 2 of the project, when the Toolkit is being developed. This will include not just the design and drafting of parts of the Toolkit (A1.2.4) but also the implementation of some of the joint actions that will be used to test and develop the Toolkit (A1.2.6) and the Capacity Development Training (A1.2.6) based on the Toolkit.</p> <p>OXFAM-IBIS, Erlassjahr.de, DDCI and Glopolis will play a strong advisory role, feeding in their experience, skills and systems to influence the design of the Toolkit (A1.2.3), inputting ideas and examples that will form part of the Toolkit, and helping with dissemination.</p>
<i>A1.3 Strategies and Workplans for New Issue Areas</i>	<p>ActionAid, Both ENDS, Re:Common, WEED, Glopolis, SOMO and ODG will sit on the New Issues Implementation Group.</p> <p>It is important to note that this work package involves advising Eurodad during Year One of the project, and may involve implementation of joint activities in the Workplan for Eurodad's first full year working on each new issue area (A1.3.3). Affiliate activity is therefore limited – in recognition of the fact that Eurodad will need to spend time developing its Workplan (A1.3.3) and Advocacy strategy (A1.3.4) for each new issue area, rather than making major plans now. The budget reflects this strategic but not time-consuming input. In recognition of their specific strength in policy development, research and analysis, WEED, Re:Common, ODG and SOMO have been selected to provide in-depth briefing papers (A1.3.1) to inform the Issue Steering Groups on the new issues.</p>
<i>A2.2 New Members Recruitment Plan</i>	<p>Ekvilib Inštitut, IGO, Demnet and Glopolis will sit on the New Members Implementation Group, and on the overall Action Steering Group.</p> <p>They have been selected because of their strong links to target countries where Eurodad is seeking to expand or strengthen its network. Most of these are in Central and Eastern Europe, which is why the Implementation Group's members have strong connections there. All Implementation Group members will play an active role in mapping potential members in the target countries where they have the strongest connections (A2.2.1), and developing the Target Outreach Plan (A2.2.2) for those countries. They will also participate in the country visits (A2.2.4) as appropriate and input into the design of new</p>

	member capacity development plans (A2.2.5).
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As the Strategic Plan focuses on strengthening the secretariat, all the work packages will be coordinated by the secretariat, as detailed below. This strengthened secretariat is a recognition, by the members who approved the Strategic Plan, of the important role it plays in (a) developing policy change demands that are transformative yet achievable, (b) building and supporting powerful coalitions for change, and (c) developing results-focused strategies to deliver the desired policy changes (see Eurodad Strategic Plan, section 2).

In addition, involving members in delivering the initiatives in the Strategic Plan involves a risk that some members may come to be seen to be more influential or favoured than others. Therefore affiliates’ roles, while fundamentally important, have been focused on producing guidance, advice and support, and in implementing outreach activities and trainings where they have a comparative advantage (for example, with members of affiliations or networks that they belong to that Eurodad does not.) Affiliate participation has also been time limited to within the first three years of the Action, in part to mitigate the above risk, but also in recognition that sustainability of the capacity development initiatives in the Strategic Plan is dependent on them eventually being able to be managed by the Secretariat, without depending on specific support from the affiliates.

However, it is important to note that all members will participate in the Action, as they are the core targets of the action, as described in section 2.2.1.3, and detailed below.

Specific Role of each Affiliate, and Rationale for selection

ActionAid – will play a core role in delivering the Advocacy planning coordination system (A1.1) and the Policy Advocacy and Communications Toolkit (A1.2), and will sit on the Implementation Group for these work packages.

This will mean that ActionAid will be responsible for drafting parts of both the Guidelines for Strategic Advocacy Planning (A1.1.1), and the Policy, Advocacy and Communications Toolkit (A1.2.4). The decision on which affiliate will draft each part of these outputs will be made during the initial project planning meeting (A4.3.1). ActionAid will also be responsible for designing and delivering some of the training at issue-based strategy meetings (A1.1.2) and training on use of the PAC Toolkit (A1.2.6). ActionAid will take the lead in reviewing all plans and draft outputs to ensure that women’s rights and gender are fully and effectively integrated, encompassing both specific parts of the work packages that focus on women’s rights and gender and a mainstreaming approach to integrate women’s rights and gender throughout the work packages.

ActionAid will also sit on the Issue Steering Group for investment treaties, attending the steering group meeting (A1.3.2) and providing comments on the Workplan (A1.1.3) and strategy (A1.3.4) for these new issues. In recognition of the major role ActionAid will play, provision has been made in the budget, focused on Years One and Two of the action, to reflect that the major inputs for these work packages will be during these two years.

ActionAid has considerable experience in capacity development on policy, advocacy, campaigning and communications for ActionAid staff, activists and the local communities it works with. ActionAid will bring the resources – tools and relevant expertise – it has across the organisation to benefit the project as regards training and capacity building. Examples of ActionAid’s experience include:

- Training tools on development finance issues, particularly relating to tax, such as the *Tax Power campaign training manual* for affiliates about how to campaign on tax, and a companion training toolkit for local communities ActionAid works with,⁶⁰ as well as specific thematic on-line trainings on double taxation treaties and on why tax is a women’s rights issue.

⁶⁰ *Tax Power Campaign Reflection-Action toolkit.*

- Training programmes and tools around women’s rights, including: an annual Women’s Rights Human Rights Based Approach training, based on an extensive training manual; and piloting of a new young feminist leadership course in 2015.
- ActionAid has developed a wide range of training and sensitisation tools targeting in particular young people and activists. This has included the development of a global network of physical youth hubs called Global Platforms, providing participatory trainings and capacity development for young people, activists and social movements to lead social, political and economic change around the world.

ActionAid has been selected to play a leading role in mainstreaming gender in core work packages because of ActionAid’s strong expertise in women’s rights in development,⁶¹ including women’s economic rights. This expertise stems from extensive research, policy analysis and advocacy in all regions of the world, for example, on the theme of women’s unpaid care⁶² – a major structural impediment to women’s economic equality. This expertise, and ActionAid’s longstanding campaigning and advocacy work on women’s rights, underpins the extensive capacity development work ActionAid on women’s rights, mentioned above.

ActionAid will also sit on the Issue Steering Group (A1.3.2) for the new issue area of investment agreement (Eurodad Strategic Plan Goal v) as it has significant experience of working on investment policies and the role of private sector in development, with a focus on agriculture including the impacts on women farmers. This experience has recently contributed to joint work with Eurodad and others to a brief on a principles approach to public-private finance for development.⁶³

Both ENDS – will play a core role in delivering the Advocacy Planning Coordination System (A1.1) and the Policy Advocacy and Communications Toolkit (A1.2), and will sit on the Implementation Group for these work packages. This will mean that Both ENDS will be responsible for drafting parts of both the Strategic Planning Guidelines (A1.1.1) and Policy, Advocacy and Communications Toolkit (A1.2.4). The decision on which affiliate will draft each part of these outputs will be made during the initial project planning meeting (A4.3.1).

Both ENDS will also be responsible for designing and delivering some of the training at issue-based strategy meetings (A1.1.2) and training on use of the PAC Toolkit (A1.2.6). Both ENDS will also sit on the Issue Steering Groups for investment treaties and climate finance, attending the steering group meetings (A1.3.2) and providing comments on the work plans (A1.1.3) and strategies (A1.3.4) for these new issues. In recognition of the major role Both ENDS will play, provision has been made in the budget, focused on Years One and Two of the action, to reflect that the major inputs for these work packages will be during these two years.

Both ENDS has considerable experience in capacity development on policy, advocacy, campaigning and communications. For example, through the development of change-focused advocacy strategies on trade and investment policies (investment treaties), as well as financial policies (multilateral development finance, export credit agencies, tax justice and climate finance). For the last five years, Both ENDS has been leading a consortium of six Dutch NGOs – the Fair, Green and Global Alliance – which, in cooperation with many partner organisations from developing countries, developed and implemented advocacy programmes on four policy areas: the development, promotion and scaling up of inspiring examples of sustainable development; the improvement of corporate conduct; the reform of (European) trade and investment policies; and the reform of the policies of major financial institutions such as development banks and export credit agencies. Both ENDS has been supporting a wide range of NGO networks with training and capacity-building workshops. For example: the Drynet

⁶¹ ActionAid (2015) *Close the Gap! The cost of inequality in women’s work*. https://www.actionaid.org.uk/sites/default/files/publications/womens_rights_on-line_version_2.1.pdf

⁶² ActionAid (2013) *Making care visible*. <http://www.actionaid.org/publications/making-care-visible>

⁶³ ActionAid et al (2015) *Delivering sustainable development: A principled approach to public-private finance*. <http://www.eurodad.org/files/pdf/55379eda24d40.pdf>

network fighting land degradation and desertification; the NGO Forum on the Asian Development Bank; and the Non-Timber Forest Products-Exchange Program.

Both ENDS will also sit on the Issue Steering Group (A1.3.2) for the new issue area of investment agreement (Eurodad Strategic Plan Goal v) as it has significant experience of working on investment agreements, and is involved in international collaboration with developing country CSOs on the Bilateral Investment Treaties (BITs) of the Netherlands, as well as regional trade & investment agreements of the EU. For example, the most recent report on this issue is *To change a BIT is not enough* (September 2015).

Both ENDS will also sit on the Issue Steering Group (A1.3.2) for the new issue area of climate finance (Eurodad Strategic Plan Goal vi) as it has significant experience of working on climate finance, including monitoring emission trading initiatives, particularly the Clean Development Mechanism over many years. In recent years Both ENDS has concentrated on promoting the access of local CSOs to the funds of the Green Climate Fund. See for example, the report *Reaching local actors in climate finance* (2013).⁶⁴

DDCI (Debt and Development Coalition Ireland) – will play a role in designing work package A1.2, and will participate in conducting the capacity assessment (A1.1.2) and producing the plan for the Toolkit (A1.2.3). DDCI will participate in the initial project planning meeting (A4.3.1). During Year Two of the project, DDCI’s role will be restricted to commenting on drafts of the Toolkit. In recognition of the important, but limited role, provision has been made in the budget, though this is limited and focused on Year One of the Action.

DDCI is a membership coalition of over 80 members (NGOs, CSOs, trade unions and campaign groups), which has 21 years’ experience both in designing and implementing its own effective campaigns and advocacy actions, as well as in building the capacity of others, both CSOs and citizen campaigners, to do the same. As a coalition with many members who are not experts in advocacy, DDCI has placed considerable emphasis on building the capacity of its members to engage in advocacy, by designing and encouraging effective lobbying techniques, and rolling out coordinated lobby actions across its members. For example, in 2014, DDCI used this experience as the basis for a reflection roundtable event on the question of “Can you hear us?”⁶⁵ with the purpose of reflecting on the effectiveness of a range of different advocacy techniques pursued by Eurodad’s members and allies.

DDCI brings specific added value to the project because it has paid considerable attention to adapting its advocacy methodologies to enhance the interest of, and engage, a broader group of citizens from beyond the formal ‘civil society’ sector. Firstly, this involved recognizing the key role of building an understanding amongst the general public between issues in developing countries and those in Ireland. To strengthen DDCI’s advocacy, the organisation has produced a number of resources examining the links between Ireland and developing countries in relation to vulture funds, tax dodging and sovereign debt crises. Secondly, in terms of enhancing engagement of non-experts in advocacy, DDCI has placed emphasis on the key link between effective popular education and successful advocacy, in order that citizens themselves feel empowered to advocate for change. For example, DDCI produced and rolled out a range of toolkits both on how to carry out advocacy, e.g. *A ‘How To’ toolkit for debt justice campaigns groups*. This was rolled out with affiliated campaign members and community groups in a series of training sessions.

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http://www.bothennds.org/uploaded_files/document/Reaching_local_actors_in_climate_finance_Both_ENDS_.pdf

65 <http://www.debtireland.org/events/2014/06/25/-can-you-hear-us-panel-debate-and-public-launch-of-the-peoples-purse-campaign-wednesday-25th-june/>; <http://www.debtireland.org/events/2014/06/25/-can-you-hear-us-panel-debate-and-public-launch-of-the-peoples-purse-campaign-wednesday-25th-june/>.

Finally, DDCI has considerable expertise in pedagogical methods. In recent years, the organisation has produced a number of toolkits to enhance understanding of economic justice issues, and the campaigning techniques that accompany them. These have included two major resources for teachers (*How The World Works*⁶⁶ and *Accounting for Justice*⁶⁷), and a number of resources aimed at adult learners (*Understanding the Irish Banking Crisis*, resources on the Eurozone debt crisis, upcoming). These methods considerably enhanced the understanding of activists and organisations who are now engaged in advocacy supportive of DDCI's aims.

Demnet – will sit on the Implementation Group for the New Members Recruitment Plan (A2.2). Their role will be to contribute to the mapping of potential members (A2.2.1) in the countries where they already have strong connections (see below), and to co-lead, with the Eurodad secretariat, on making and following up on connections, including participating in country visits to those countries (A2.2.4). Through membership of the Implementation Group, they will also contribute to the development and update of the Target outreach plan (A2.2.2) and the capacity development plans (A2.2.5) for targets in the countries where they have strong connections. In recognition of the major role played, provision has been made in the budget, focused on Years One and Two of the action, to reflect that the major inputs for these work packages will be during these two years.

Since its establishment in 1996, DemNet has been playing an active role in civil society development in the Balkan countries and in the Eastern Partnership region. DemNet has a solid track record in supporting democratic transition in the countries of the former Yugoslavia. DemNet has led or contributed to various projects that supported community based organisations and grassroots associations in the Eastern Partnership countries, as well as in the Balkans (Fit and CONNECT, Community Media +, Young Researchers, for example.). Project partners included civil society organisations from Albania, Armenia, Bosnia and Herzegovina, Kosovo, Georgia, Macedonia, Moldova and Serbia.

Ekvilib Inštitut – will sit on the Implementation Group for the New Members Recruitment Plan (A2.2). Their role will be to contribute to the mapping of potential members (A2.2.1) in the countries where they already have strong connections (see below), and to co-lead, with the Eurodad secretariat, on making and following up on connections, including participating in country visits to those countries (A2.2.4). Through membership of the Implementation Group they will also contribute to the development and update of the Target outreach plan (A2.2.2) and the capacity development plans (A2.2.5) for targets in the countries where they have strong connections. In recognition of the major role played, provision has been made in the budget, focused on the first three years of the action, to reflect that the major inputs for these work packages will be during these three years.

Ekvilib Inštitut will contribute to strengthening the membership base in Slovenia, where current membership is restricted to one member, covering only one of four of Eurodad network's issues. It is an active member of existing Slovenian NGO networks, and is therefore well placed to lead this outreach.

Furthermore Ekvilib Inštitut will contribute to the mapping (A2.2.1) of potential members in CEE, as well as developing and helping follow up on the target outreach plan to them (A2.2.2). The institute has particularly good connections with CSOs in former Yugoslav republics, focusing on EU member states (Croatia) and EU candidates including the Republic of Macedonia, Montenegro and Serbia, and also potential candidates for EU (Bosnia and Herzegovina and Kosovo). Previous business connections made in past projects, existing networks and personal connections and also the similarity in languages are major advantages for this work. Examples of Ekvilib's connections in the region include being a co-founder of the Balkan network for corporate social responsibility (CSR). The institute has extensive experience of projects in the Balkan region such as: Time for women's rights

⁶⁶ http://www.debtireland.org/download/pdf/how_the_world_works.pdf

⁶⁷ http://www.developmenteducation.ie/media/documents/accounting_for_justice.pdf

and gender equality in Montenegro (May 2014 to September 2016); CSR Award scheme in the regions (2012-2013); Youth Leadership Programme with Central Europe, three cycles (2011, 2012, 2013).

Erlassjahr.de – will play a role in designing work package A1.2, and will participate in conducting the capacity assessment (A1.1.2) and producing the plan for the PAC Toolkit (A1.2.3). Erlassjahr.de will participate in the initial project planning meeting (A4.3.1). During Year Two of the project, Erlassjahr.de’s role will be restricted to commenting on drafts of the Toolkit. In recognition of the important, but limited role, provision has been made in the budget, though this is limited and focused on Year One of the Action.

Erlassjahr.de is experienced in designing different types of advocacy work aimed at specific institutional targets and changing particular policies of those targets. Actions concern decision-makers at national (German), European and international level. Actions are related to the issue (and aspects) of sovereign debt justice. They include public and media actions, as well as targeted advocacy actions with different kinds of instruments, which are chosen according to the context, aim of the action and the relationship with the targeted decision-makers. Three main ways can be summarised: “collaboration”, which means working closely with the particular target to try to achieve a direct change in its policies; “confrontation”, trying to achieve change by openly challenging the ideas and policies; and “consciousness-raising”, which involves campaigning work to change public opinion, with the effect of having indirect influence. Advocacy and campaign work are a regular feature of Erlassjahr.de’s work, thus examples can be found on the website.⁶⁸

Erlassjahr.de has a broad membership of church-based actors, development-related initiatives and other CSO actors that usually do not work intensively on development finance or macroeconomic issues themselves. Thus, with each new campaign aimed at debt justice, Erlassjahr.de conducts training workshops and guides on how to engage with decision-makers, including through the production of campaign-focused toolkits. One work stream of Erlassjahr.de is information and education work.⁶⁹

Glopolis – will sit on the Implementation Group for the New Members Recruitment Plan (A2.2). Their role will be to contribute to the mapping of potential members (A2.2.1) in the countries where they already have strong connections (see below), and to co-lead, with the Eurodad secretariat, on making and following up on connections, including participating in country visits to those countries (A2.2.4). Through membership of the Implementation Group they will also contribute to the development and update of the Target outreach plan (A2.2.2) and the capacity development plans (AA2.2.5) for targets in the countries where they have strong connections. Glopolis will also sit on the Issue Steering Groups for all three new issues (financial sector reform, investment treaties and climate finance), attending the Issue Steering Group meetings (A1.3.2) and providing comments on the Workplans (A1.3.3) and strategies (A1.3.4) for these new issues. In recognition of the major role played, provision has been made in the budget.

Glopolis has strong connections in Central and Eastern European (CEE) countries, especially in Poland, Hungary, Bulgaria, Slovenia and Latvia in capacity building. For example, in the current EC-funded project *Mobilising European citizens to place inequality and tax justice at the heart of the European development agenda during EYD 2015 and beyond*, Glopolis is responsible for assisting CEE partners with the implementation of their activities.

⁶⁸ www.erlassjahr.de

⁶⁹ Examples of information and education work can be found on the website: <http://www.erlassjahr.de/ausstellung/willkommen-zu-geschichten-der-schuldenkrise.html>, <http://www.erlassjahr.de/material-und-publikationen/material-und-publikationen.html>. Campaign-focused material is taken offline after the completion of the campaign. Presentations produced for trainings are not usually uploaded. However, Erlassjahr.de is happy to send examples upon request.

Glopolis will also sit on the Issue Steering Group (A1.3.2) for the new issue area of Financial Sector Rules (Eurodad Strategic Plan goal vi) owing to its experience in this area, especially through its work on financial regulation with a focus on European regulatory framework and a thematic focus on financial derivatives and commodity markets, especially in relation to food speculation. Glopolis has monitored the financial markets and financial reforms for many years. Following the outbreak of the last global financial crisis, it was part of the EU project “Towards a Global Financial System at the Service of Sustainable Development” under which produced several reports, briefing papers and events.

Glopolis will also sit on the Issue Steering Group (A1.3.2) for the new issue area of climate finance (Eurodad Strategic Plan Goal vi), as it has significant experience of working on climate finance, through its active engagement in international climate negotiations, and through influencing debate about Czech climate and energy policy and supporting sustainable energy development in developing countries. Glopolis has a long history of cooperation with leading NGOs on the issue of climate finance, especially CAN-Europe, with a special focus on the role of the private sector, accountability and exchange of advocacy experience.

OXFAM-IBIS – will play a role in designing work package A1.2, and will participate in conducting the capacity assessment (A1.1.2) and producing the plan for the Toolkit (A1.2.3). OXFAM-IBIS will participate in the design of the Toolkit (A1.2.4), and the dissemination plan (A1.2.3). OXFAM-IBIS’s role is therefore to focus on guiding the design of the Toolkit, given its wealth of experience in this area, particularly its experience of producing similar training resources that are relevant to partners from developing countries.

For more than 20 years, OXFAM-IBIS has systematically influenced finance for development issues in Denmark, the EU, globally and in developing countries. OXFAM-IBIS has a very strong track record of participating in and coordinating Danish and pan-European influencing, designing influencing strategies, coordinating influencing across a number of countries, designing as well as preparing guides and toolkits for influencing, including toolkits for campaigners and volunteers in Denmark. OXFAM-IBIS also conducts capacity assessments and builds the capacity of partners in Latin America, Africa in the EU and Nordic countries for influencing. For example, in 2014 OXFAM-IBIS was contracted by DANIDA to train the aid agency’s African partners on influencing resource mobilisation from extractive industries. OXFAM-IBIS has a participatory and action-learning approach to capacity assessments, training, capacity building and influencing, combining guidance and learning based on toolkits with coordinated action and carrying out campaign and influencing activities.⁷⁰

IGO – will sit on the Issue Steering Group for the New Members Recruitment Plan (A2.2). Their role will be to contribute to the mapping of potential members (A2.2.1) in Poland,⁷¹ and to co-lead, with the Eurodad secretariat, on making and following up on connections, including participating in country visits (A2.2.4). Through membership of the Issue Steering Group, IGO will also contribute to the development and update of the Target outreach plan (A2.2.2) and the capacity development plans (A2.2.5) for targets in Poland.

IGO will also sit on the Steering Group on investment treaties, attending the Issue Steering Group meetings (A1.3.2) and providing comments on the Workplans (A1.3.3) and strategies (A1.3.4) for these new issues. In recognition of the major role played, provision has been made in the budget.

⁷⁰ An example is the *OXFAM-IBIS Budget Analysis Guide & Toolkit* used for working with partners in developing countries, and the approach used for joint North-South campaigning on tracking profits from the diamond industry in Sierra Leone. See toolkit here: <http://Oxfam-IBIS-admin.org/promm/6-approaches-and-methodologies/>

⁷¹ IGO has been a part of the umbrella organisation Grupa Zagranica (Abroad Group) from the beginning of its existence from 2007. Grupa Zagranica is a Polish platform of CSOs (61 NGOS), engaged in development cooperation, democracy support, humanitarian aid and global education.

IGO has considerable experience of working on investment rules and financial sector reform. For the last three years, it has been actively implementing an extensive project *BITs in pieces. Making EU Investment Policy Work for Sustainable Development*. The project has been focused on international investment and trade relations, in particular involving countries from developing countries, and has been based on multilateral cooperation with international partner organisations. In cooperation with project partners, IGO recently published several reports and policy briefs on investment such as *International Investment Agreements Under Scrutiny*.

ODG (Observatorio de la Deuda en la Globalización) – will sit on the Issue Steering Group for investment agreements, attending the steering group meeting (A1.3.2) and providing comments on the Workplan (Activity A1.3.3) and strategy (A1.3.4), and lead the drafting of a key background briefing (A1.3.1) for this new issue. ODG has worked on the issues of financial sector reform and investment, both within the EU as well as from a global development perspective, for example, working with NGOs in Europe and Latin America. It has been active in carrying out research and advocacy on the impacts that the activities of export credit agencies have had in Latin America. In the years of the financial crisis, ODG has focused its research on the impact of bailouts and banking sector restructuring in Spain,⁷² and has proposed policies that could help to mitigate the impact of the current crisis.⁷³ Over the years, ODG has also studied the financialisation of different infrastructures,⁷⁴ turning its attention to different scales and regions that range from the local to the global. Currently, ODG is studying the likely impact that the Transatlantic Trade and Investment Partnership (TTIP) would have on financial regulation and the financial structure, both in Spain and Europe in general.

Re:Common – will sit on the Issue Steering Groups for all three new issues (A1.3.2) and will provide comments on the Workplans (A1.3.3) and strategies (A1.3.4) for these new issues. Re:Common will also lead the drafting of a key background briefing (A1.3.1). In particular, Re:Common has considerable experience of working on these issues, and has always engaged in Eurodad activities with a crosscutting approach, trying to help establish links among different pillars of the Eurodad workplan.

As concerns investment agreements and their development impacts, Re:Common is co-applicant in a EuropeAid funded project DCI-NSAED/2012/279-800 *Making EU Investment Policy Work for Sustainable Development* led by the Transnational Institute. Re:Common participated in official consultations on investment arbitration and ISDS with the Italian government and the European Commission. Re:Common is involved in international collaboration with CSOs from developing countries on this issue and is about to issue a new briefing on the controversial negotiations of a BIT Italy-Colombia after extensive research on the ground (November 2015). In 2007 Re:Common (then named CRBM) published a book in Italian on this matter.⁷⁵

Regarding climate finance, Re:Common has a long-standing experience in monitoring International Financial Institution (IFI) involvement in carbon and climate finance, particularly the Clean Development Mechanism and REDD and REDD+ projects over many years. Re:Common had a specific focus on the European Investment Bank and its external lending to developing countries in the last few years.⁷⁶ As part of a recent EuropeAid funded project,⁷⁷ Re:Common steered and facilitated a

⁷² See *Why we shouldn't pay the debt. Reasons and Alternatives*. Available at http://odg.cat/sites/default/files/why_we_shouldnt_pay_the_debt.pdf

⁷³ See for example: Lapavitsas, C; Munevar, D; and Cutillas, S. (April, 2014). *Capital Controls: A Practical Guide*. RMF and ODG. Available at <http://odg.cat/en/publication/capital-controls-practical-guide>

⁷⁴ See for example: Beizsley, D. (2015). *Financialisation of infrastructure. The true cost*. ODG. Available at http://odg.cat/sites/default/files/financialisation_of_infrastructure_eng_final.pdf

⁷⁵ CRBM (2007) *Non Investiamoli! La liberalizzazione degli investimenti nei paesi più poveri e le responsabilità europee* (Rome).

⁷⁶ See for example, the report: Re:Common (2014) *Banking on Forests*.

⁷⁷ DCI-NSA/2012/296-306 *Development finance for equitable growth: enhancing dialogue between EU civil society and decision-makers*, led by Eurodad.

working group specifically on “carbon finance and financialisation of nature” and related IFIs investment and facilitated contacts with CSOs from developing countries on the issue, including through fact-finding missions to developing countries.

Finally, Re:Common has paid particular attention to the role of private equity funds in development and the lack of adequate regulation of these new financial actors through which about half of investment into infrastructure and large-scale operations move. As examples, Re:Common (then named CRBM) researched the role of private equity investment in land grabbing in developing countries.⁷⁸ Re:Common is making specific efforts to work more closely with anti-corruption groups in developing countries to tackle specific financial regulation and development issues.

SOMO (Centre for Research on Multinational Corporations) – will sit on the Issue Steering Groups for financial sector reform and for investment agreements, attending the Issue Steering Group meetings (A1.3.2) and providing comments on the Workplans (A1.3.3) and strategies (A1.3.4) for these new issues. Drawing on its extensive expertise, SOMO will also provide an in-depth background briefing paper (A1.3.1) to feed into the Issue Steering Group discussions.

SOMO has experience of working on the issues of investment treaties and Investor-State Dispute Settlements (ISDS), both within the EU as well as from a global development perspective. For example, they have worked with NGOs in Indonesia and India on reforms of investment frameworks. Other examples include co-organising a European Spring School on investment law and investment arbitrations in 2014, with participants from the EU but also from several developing countries and a week of action on investment, organising hands-on knowledge training on investment arbitration and ISDS in 2015. SOMO has produced numerous publications on the subject, including, for example, *Dutch investment treaties harm the public interest-CSOs call for fundamental policy reform*, in January 2015.⁷⁹ SOMO is also part of the EU consortium, EC-funded work programme: *Making EU Investment Policy work for Sustainable Development* (2013-2015).

SOMO has considerable experience of working on issues related to the financial sector and financial reforms not only in the EU but also in developing countries and internationally via financial forums, such as the G20. SOMO has been working on particular issues of interest to developing countries, such as the EU legislation that should prevent food price speculation through food commodity derivatives trading. Another focus has been bank reforms since many EU banks operate in developing countries. SOMO has been working with developing country NGOs on financial issues to share information and build knowledge and capacity. For example, SOMO co-organised an international NGO workshop in September 2015 in Ankara, coinciding with the meeting of the G20 ministers of finance and central bank governors, to discuss with developing country partners their experience about financial sector issues as well as the international financial agenda of the G20. Recent publications include a regular *Financial Reform Newsletter* (with WEED) that briefs NGOs and academics EU financial policies and legislation from a critical perspective; and a comprehensive overview of sustainable finance initiatives across the globe, in the banking and investment world.

WEED – will sit on the Issue Steering Group for financial sector reform, attending the steering group meeting (A1.3.2) and providing comments on the Workplan (Activity A1.3.3) and strategy (A1.3.4), and lead the drafting of a key background briefing (A1.3.1) for this new issue. WEED has monitored the financial markets and financial reforms for decades. Following the latest global financial crisis, it led the EU project *Towards a Global Financial System at the Service of Sustainable Development* and the Ford Foundation Project *Ways out of the Crisis – Democratic Governance of EU Finance for Sustainable Development & Social Equity*. In this context, WEED has published a regular newsletter *EU Financial Reform* in collaboration with the Dutch organisation SOMO (also an affiliate), produced various reports, briefing papers, short films as well as fact sheets and held numerous events (workshops, conferences) on subjects including financial reforms, banks, investment funds, financial

⁷⁸ *The Vultures of Land Grabbing* (2010).

⁷⁹ See <http://somo.nl/news-en/dutch-investment-harm-the-public-interest>

products, rating agencies, high frequency trading, commodity speculation, tax evasion, tax avoidance, money laundering, debt relief, infrastructure investments and a financial transaction tax. WEED has also done press work on these issues, held many speeches, and took part in panels at conferences. For example, WEED was on a panel with the Finance Ministry for the German G7 civil society dialogue in June 2015.

Role of other Target Groups

As noted above, the Action has been designed to involve Target Groups other than Eurodad members, and some of the work packages are targeted specifically at them.

- A1.1 – *Advocacy Planning Coordination System* – the issue-based strategic planning meetings (A1.1.2), Eurodad conferences (A1.1.3) and the Policy Forum (A1.1.4) will be open to European CSOs and CSOs from developing countries that are not Eurodad members. In addition, as highlighted above, the Guidelines for strategic advocacy planning (A1.1.1) are intended to be a relevant resource for all CSOs. The dissemination plan detailed later in this application⁸⁰ will target them.
- A1.2 – *Policy, Advocacy and Communications Toolkit* – European CSOs that are not members will be invited to participate in the Joint actions across Europe based on common strategies (A1.2.5). Trainings based on the Toolkit (A1.2.6) will involve significant numbers of Target Groups B and C, as detailed in section 2.2.1 above. In addition, as highlighted above, the Toolkit is intended to be a relevant resource for all CSOs from Europe and around the world, which will be targeted in its dissemination plan (A1.2.3).
- A1.3 – *Strategies and Workplans for New Issues Areas* – experts from CSOs that are not members will be invited to participate in the Issue Steering Group (A1.3.2). In addition, as Eurodad develops a clear and active strategy and Workplan (A1.3.3, A1.3.4 and A1.3.5) in each issue area, this will involve working closely with all active organisations in Target Groups B and C.
- A2.1 – *Communications Outreach Plan* – Target Groups B and C will be the key consumers of these products, and are a key part of the audience, which will be surveyed (A2.1.1) to decide how best to meet their needs. A much-improved CRM system (A2.1.2) will allow personalised communications with them.
- A2.2 – *New Members Recruitment Plan* – this will bring some members of Target Group B (European CSOs active on Eurodad issues) into Target Group A (Eurodad members), but the process of doing this will also strengthen links to a wider set of organisations in Target Group B.
- A3.1 – *Joint strategy development with global partners* and A3.2 – *Organisational development support for DAD networks* – are actively designed to improve working and joint strategising with Target Group C (global CSO coalitions and networks).

Means of implementation

Given the nature of Eurodad as set out in the Strategic Plan, and the focus of this Action on development of the institutional, organisational and representation capacity of the umbrella organisation, the majority of the means of implementation will be the staff time of Eurodad secretariat and affiliate staff, as set out in the budget. In addition, the following means of implementation have been identified and are included and explained in full in the budget, attached as an Annex:

- Travel (both international and local)
- Equipment and supplies (office furniture sets and computers for new staff, plus upgrades to IT infrastructure equipment.)

⁸⁰ See section 2.2.2.4

- Local office costs (a proportion of office rent and consumables, and other expenses including telephone costs.)
- Other costs, services (including audit, evaluation, and translation costs)
- Other (Publication editing, design and printing, events costs – venue catering and services, and consultancy costs for specific activities that require specialist expertise.)

Attitudes of stakeholders

The following table summarises the attitudes of key stakeholders. Members of the Target Groups and the final beneficiaries are treated briefly, as they have already been examined in detail.

Stakeholder	Summary of attitudes to Action
Target Group A: The members of the Eurodad network	Extremely active supporters and engaged participants of the Action, with a majority included as affiliates or associates of the Action. The Action is designed to support the implementation of the Strategic Plan, which was approved by all Eurodad members at the 2015 General Assembly.
Target Group B: Other European CSOs working on development finance issues	Active supporters and engaged participants of the Action, as described above.
Target Group C: global CSO coalitions and key CSO networks from other regions	Active supporters and engaged participants of the Action, with three regional DAD networks included as associates.
Engaged citizens in Europe	As described above, the fact that Eurodad and members regularly mobilise large numbers of citizens to take action on development finance issues, ⁸¹ and the fact that Eurodad network members have large numbers of active supporters and members from the general public shows the likely positive attitude of these stakeholders to improvements in the way the Eurodad network works as a result of this Action.
Policy-makers in Europe and multilaterals	As noted above, improving Eurodad’s ability to influence policy-makers is the ultimate purpose of the Strategic Plan, and the successes achieved in the past, summarised in Eurodad’s Annual Reports, ⁸² are testament to the engagement that policy-makers have with the Eurodad network. While they may not always be supportive of the positions and demands of Eurodad – overcoming such resistance is a key part of Eurodad’s work – as the Strategic Plan notes, they respect the rigour of analysis and the legitimacy and objectives of the actors in the network.
Journalists and media professionals	As described above, Eurodad and network members have strong working relationships with media professionals across Europe, who have shown that they are very interested in the kinds of advocacy initiatives supported by the Action, and several of the joint actions (A1.2.5) envisaged under this project will include significant outreach to journalists.

⁸¹ As noted above, a recent example of citizen engagement through the Eurodad network was the multi-country petition that garnered over 100,000 citizens’ signatures in favour of a systematic debt workout procedure to prevent and rapidly resolve debt crises.

⁸² <http://eurodad.org/1318465/>

Ensuring visibility

Eurodad is committed to communicating the achievements and impact of the Action and highlighting the importance of the partnership with the EU. As described in detail previously, the Action will target a large number of CSOs in Europe and globally, but will also result in high levels of visibility to other stakeholders, including journalists, policy makers and European citizens.

Eurodad has considerable experience of implementing European Commission-funded projects, and has tried and tested procedures in place to make sure Eurodad makes visible the fact that the EU has co-financed activities and programmes. These procedures are designed to ensure that Eurodad complies with the Communication and Visibility Manual for European Union External Actions.⁸³

A Communication Plan (A.4.2.11) will be prepared early in Year One of the Action, and updated annually, including by summarising achievements. This will be reported to the Commission and will be robust, detailing the external communication activities that will take place at key stages in the life of the action yet flexible enough so as to capitalise on any unexpected opportunities to publicise the impact of the Action. It will be integrated into dissemination plans attached to specific work packages (such as A1.2.3).

Eurodad will mention the Action and the EU's financial contribution in information given to the final recipients of the Action, such as during the trainings (A1.2.6) strategic planning meetings (A1.1.2), international conferences (A1.1.3) issue-based Seminars (A1.3.6), Country visits (A2.2.4) and the Policy Forum (A1.1.4), as well as in its internal and annual reports, and in dealings with the media that mention the Action (particularly under work package A2.1), taking care to include the disclaimer that the content of the Action is the sole responsibility of Eurodad and can under no circumstances be regarded as reflecting the position of the European Union.

Eurodad will display the EU logo, with the required disclaimer, wherever appropriate, including on reports (such as A1.3.7) guidelines (such as A1.1.1) and communications materials (such as those in work package 2.1).

The extremely valuable funding contribution of the EU will also be highlighted when dealing with other donors, under work package A4.3.

Contribution to Eurodad's Strategic Plan

As already set out (section 2.2.1.2), the Action will make a major contribution to Eurodad's Strategic Plan, as it is focused on expanding the Eurodad network into three major new issue areas, implementing the advocacy and network strengthening initiatives of the Strategic Plan, and strengthening the secretariat, as envisaged in the Strategic Plan.

In addition, it is worth emphasising how the Action's impacts go beyond the specific initiatives it focuses on, to support the whole Strategic Plan:

- *Capacity development helps the whole Strategic Plan:* The major capacity development initiatives, including the Advocacy Planning Coordination System (A1.1) and the PAC Toolkit (A1.2) have been designed to focus on Eurodad's core roles, and will therefore bring improvements in delivering all the issue goals of the Strategic Plan.
- *Expanding the network has multiplier effects for the rest of Eurodad's work:* Bringing in new issue areas (A1.3) will help to strengthen ties with existing members, as well as bringing Eurodad into contact with new targets for this Action. It will also deepen understanding of cross-cutting issues, and help to make links between issue areas, as well as feeding the research and analysis priorities of the Strategic Plan (which are not a focus of this Action.)

⁸³ See http://ec.europa.eu/europeaid/work/visibility/documents/communication_and_visibility_manual_en.pdf
http://ec.europa.eu/europeaid/work/visibility/documents/communication_and_visibility_manual_en.pdf

Bringing on board new members (A2.2) will make the coalitions Eurodad builds more powerful in all of its work, with the ability to reach all EU member states.

- *A strengthened, well-resourced secretariat underpins the whole Strategic Plan:* Eurodad members explicitly approved this move, when the General Assembly approved the Strategic Plan, because they recognised how important good coordination, network building, capacity development, and resource provision by the secretariat is for both their work at national level, and also to build pan-European and global coalitions for change. By allowing the secretariat to expand to the size envisaged in the Strategic Plan (A4.1) and ensuring that the fundraising systems are in place (A4.2) to maintain this size as the contribution of the funding from this Action to Eurodad's overall budget is gradually phased out, this Action makes a significant contribution to achieving the whole of Eurodad's Strategic Plan.

Potential synergies with other initiatives

This has already been covered earlier in the application (section 2.2.1.2), which describes how the Action has significant synergies with key global agreements that the EU has endorsed, such as the Addis Ababa Action Agenda and the Sustainable Development Goals, as well as the EU's priorities in the field of development cooperation, particularly its commitment to policy coherence for development.

Procedures for follow up and evaluation

Eurodad's approach to monitoring, evaluation, and learning (MEL) which will be upgraded by this Action,⁸⁴ will be focused on measuring and evaluating impacts at two levels:

- *Direct impacts on Target Groups* – these are the groups that the Action can be expected to have a direct impact on. The results required all have impacts on these groups at their core, meaning that the Logframe (section 2.2.2.5) provides a useful summary of the indicators of success and how these will be measured.
- *Impacts on the policy changes that are foreseen in the Strategic Plan* – given that these impacts happen at multilateral level, they require the concerted efforts of coalitions built across Europe and the globe, which are the focus of the Action. However as the risk management framework (see section 2.2.2.4) highlights, they are also subject to a variety of other external and internal influences. This means that impact measurement is best focused on the ultimate goals – to what extent have the policy change goals in the Strategic Plan been met? This applies particularly to result numbers one and two, which have appropriate indicators and means of verification in the Logframe.

Specifically, to ensure that the Action is well planned, followed up and evaluated, with lessons learned being fed back into the planning of future activities, a work package devoted to this (A4.2) has been designed, which can be summarised as follows:

- Well-prepared annual project planning meetings (A4.2.1) and quarterly teleconferences (A4.2.2) to ensure the Action is tightly managed. An inception meeting (A4.2.1) will set out in clear detail what each partner must deliver, with deadlines.
- Reviews of implementation of the Action will be integrated into Eurodad's twice yearly staff Away Days (A4.2.3).
- An upgrade to Eurodad's MEL Framework will be developed, which will impact all of Eurodad's work. This will learn the lessons from, and be integrated into the other relevant work packages of the Action. This will draw on best practices and existing MEL frameworks

⁸⁴ Activities A4.2.6 and A4.2.7.

and criteria, including those produced by the European Commission (which examine relevance; efficiency; effectiveness; impact; and sustainability).⁸⁵

- All Eurodad workplans and strategies are approved by the Eurodad General Assembly and these and all other Strategic Plan initiatives are approved and overseen by the Eurodad Board, which is elected by members. The participation of these key members of Target Group A for the Action will be integrated into the major meetings of these two bodies.
- A strategy renewal evaluation (A4.2.8), which will include an external evaluation of Eurodad's progress in delivering the Strategic Plan, including the initiatives detailed in this Action. This review will feed into Strategic Review Away Days (A4.2.9) that will involve the Eurodad Board and partners from developing countries, which will develop any proposals for adjustments to the Strategic Plan, to be approved by the Eurodad General Assembly the following year.
- Finally, a second final external evaluation (A4.2.10) will be carried out at the end of the Strategic Plan period, to feed into the development of a new five-year plan for Eurodad. This will include an impact assessment of the Strategic Plan period, which will also evaluate the relevance, the effectiveness and the efficiency of the Action and make recommendations for ensuring further sustainability of the benefits of the Action. This evaluation will include the participation of members and other Target Groups and will be incorporate their reflections on the contribution that Eurodad has made. This evaluation will include a 'lessons learned' component which will be disseminated widely to other networks and organisations in order to magnify the impact of the Action.

⁸⁵ European Commission (2006) *Evaluation Methods for the European Union's External Assistance, Methodological Bases for Evaluation*, Volume 1; (Directorate General External Relation & Directorate General Development)

2.2.2.3 Duration and indicative action plan for implementing the Action

The duration of the Action will be 48 months.

<u>YEAR 1</u>													
	Half-year 1						Half-year 2						
Activity	1	2	3	4	5	6	7	8	9	10	11	12	Indicative implementing body
A1.1 - Advocacy Planning Coordination System													Eurodad, ActionAid, Both ENDS
A1.1.1 - Guidelines for strategic advocacy planning (1)													Eurodad, ActionAid, Both ENDS
A1.1.2 - Issue-based strategic planning meetings (14)													Eurodad, ActionAid, Both ENDS
A1.1.3 - Eurodad International Conference (2)													Eurodad
A1.1.4 - Eurodad Policy Forum (1)													Eurodad
A1.1.5 - Revision of guidelines (1)													Eurodad, ActionAid, Both ENDS
A1.1.6 - 2nd Revision of Guidelines (1)													Eurodad
A1.2 - Policy, Advocacy and Communications Toolkit													Eurodad, ActionAid, Both ENDS, OXFAM-IBIS, Ehrlassjahr, DDCL, Glopolis
A1.2.1 - Concept note and plan for capacity assessment (1)													Eurodad, ActionAid, Both ENDS, OXFAM-IBIS, Ehrlassjahr, DDCL, Glopolis

A2.1 - Communications Outreach Plan												Eurodad
A2.1.1 - Audience Review (1)												Eurodad
A2.1.2 - CRM Review (1)												Eurodad
A2.1.3 - Website upgrade (1)												Eurodad
A2.1.4 - Newsletter improvements (60)												Eurodad
A2.1.5 - Social media review (1)												Eurodad
A2.1.6 - Eurodad updates (8)												Eurodad
A2.1.7 - Activists guides (7)												Eurodad
A2.2 - New Members Recruitment Plan												Eurodad, Ekvilib Institut, IGO, Demnet,
A2.2.1 - Mapping of potential members (1)												Eurodad, Ekvilib Institut, IGO, Demnet,
A2.2.2 - Target outreach plan (4 as updated annually)												Eurodad, Ekvilib Institut, IGO, Demnet,
A2.2.3 - Eurodad membership benefits summary (1)												Eurodad
A2.2.4 - Country visits (18)												Eurodad, Ekvilib Institut, IGO, Demnet,
A2.2.5 - New member capacity development plans (9)												Eurodad, Ekvilib Institut, IGO, Demnet,
A3.1 - Joint Strategy Development with Global Partners												Eurodad

<u>FOR THE FOLLOWING YEARS</u>									
	Half-year 3	4	5	6	7	8	9	10	
Activity	Q1-2	Q3-4	Q1-2	Q3-4	Q1-2	Q3-4	Q1-2	Q3-4	Indicative implementing body
A1.1 - Advocacy Planning Coordination System									Eurodad, ActionAid, Both ENDS
A1.1.1 - Guidelines for strategic advocacy planning (1)									Eurodad, ActionAid, Both ENDS
A1.1.2 - Issue-based strategic planning meetings (14)									Eurodad, ActionAid, Both ENDS
A1.1.3 - Eurodad International Conference (2)									Eurodad
A1.1.4 - Eurodad Policy Forum (1)									Eurodad
A1.1.5 - Revision of guidelines (1)									Eurodad, ActionAid, Both ENDS
A1.1.6 - 2nd Revision of Guidelines (1)									Eurodad
A1.2 - Policy, Advocacy and Communications Toolkit									Eurodad, ActionAid, Both ENDS, OXFAM-IBIS, Ehrlassjahr, DDCI, Glopolis
A1.2.1 - Concept note and plan for capacity assessment (1)									Eurodad, ActionAid, Both ENDS, OXFAM-IBIS, Ehrlassjahr, DDCI, Glopolis

A1.2.2 - Capacity assessment and audit of network (1)									Eurodad
A1.2.3 - Plan for Toolkit production and dissemination (1)									Eurodad, ActionAid, Both ENDS, OXFAM-IBIS, Ehrlassjahr, DDCI, Glopolis
A1.2.4 - Toolkit produced (1)	■	■							Eurodad, ActionAid, Both ENDS, OXFAM-IBIS, Glopolis
A1.2.5 - Joint actions across Europe based on common strategies (84)	■	■	■	■	■	■			Eurodad, ActionAid, Both ENDS, OXFAM-IBIS, Glopolis
A1.2.6 - Capacity development training using Toolkit (25)		■	■	■	■	■			Eurodad, ActionAid, Both ENDS, OXFAM-IBIS, Glopolis
A1.3 - Strategies and Workplans for New Issue Areas	■								Eurodad, ActionAid, Both ENDS, Re:Common, WEED, Glopolis, SOMO
A1.3.1 - Scoping studies (3) and background briefings (3)									Eurodad, Re:Common, WEED, SOMO
A1.3.2 - Issue Steering Group meeting (3)									Eurodad, ActionAid, Both ENDS, Re:Common, WEED, Glopolis, SOMO
A1.3.3 - Workplan 1 (3)	■	■							Eurodad, ActionAid, Both ENDS, Re:Common, WEED, Glopolis, SOMO
A1.3.4 - Advocacy strategy (3)		■							Eurodad
A1.3.5 - Workplan 2, based on advocacy strategy		■	■	■					Eurodad
A1.3.6 - Seminar (3)	■								Eurodad
A1.3.7 - Agenda-setting Report (3)		■							Eurodad

A2.1 - Communications Outreach Plan									Eurodad
A2.1.1 - Audience Review (1)									Eurodad
A2.1.2 - CRM Review (1)									Eurodad
A2.1.3 - Website upgrade (1)									Eurodad
A2.1.4 - Newsletter improvements (60)									Eurodad
A2.1.5 - Social media review (1)									Eurodad
A2.1.6 - Eurodad updates (8)									Eurodad
A2.1.7 - Activists guides (7)									Eurodad
A2.2 - New Members Recruitment Plan									Eurodad, Ekvilib Institut, IGO, Demnet,
A2.2.1 - Mapping of potential members (1)									Eurodad, Ekvilib Institut, IGO, Demnet,
A2.2.2 - Target outreach plan (4 as updated annually)									Eurodad, Ekvilib Institut, IGO, Demnet,
A2.2.3 - Eurodad membership benefits summary (1)									Eurodad
A2.2.4 - Country visits (18)									Eurodad, Ekvilib Institut, IGO, Demnet,
A2.2.5 - New member capacity development plans (9)									Eurodad, Ekvilib Institut, IGO, Demnet,
A3.1 - Joint Strategy Development with Global Partners									Eurodad

A3.1.1 - Scoping of potential partners (1)									Eurodad
A3.1.2 - Participation in global and regional strategic discussions (48)									Eurodad
A3.2 - Organisational Development Support for DAD Networks									Eurodad
A3.2.1 - Monthly telecons (40)									Eurodad
A4.1 - Recruitment of New Staff									Eurodad
A4.1.1 – Phase 1 – recruitment of programme management staff									Eurodad
A4.1.2 – Phase 2- recruitment of staff to work on new issues recruitment (3)									Eurodad
A4.2 - Planning and Evaluations									Eurodad
A.4.2.1 - Project planning and evaluation meetings (5)									Eurodad
A4.2.2 - Project planning teleconferences (16)									Eurodad
A4.2.3 - Staff Away Days (9)									Eurodad
A4.2.4 - Eurodad Board face to face meetings (4)									Eurodad
A4.2.5 - Eurodad General Assemblies (5)									Eurodad
A4.2.6 - MEL Framework consultation (1)									Eurodad
A4.2.7 - MEL Framework (1)									Eurodad

A4.2.8 – Strategy renewal evaluation (1)	■	■							Eurodad
A4.2.9 - Strategic review away days (2)		■				■			Eurodad
A4.2.10 - Final evaluation (1)						■	■		Eurodad
A4.2.11 - Communication Plan (1)	■		■		■		■		Eurodad
A4.3 - Fundraising Pipeline Planning System	■								Eurodad
A4.3.1 - Research summaries of hitlist donors (12)									Eurodad
A4.3.2 - Concept notes for each issue area + cross cutting issues (10)									Eurodad
A4.3.3 - Relationship management and assessment of all hitlist funders (1)									Eurodad
A4.3.4 - Monthly updates on relationships with hitlist (48)	■	■	■	■	■	■	■		Eurodad

2.2.2.4 Sustainability of the action

Financial Sustainability

The Action has been designed to supplement existing sources of income, which already provide a solid basis for Eurodad's work. The Action's financing is front-loaded, with the major investment planned during the first two years of the Action. This is in recognition of the fact that the design of the major capacity development initiatives was planned during the first half of the Strategic Plan, to allow time for their implementation and assessment of impacts. It was also designed to allow Eurodad to expand its secretariat staff capacity rapidly (A4.1), including its capacity to fundraise, both through the hiring of a dedicated Fundraising Coordinator, and through the additional senior management position of Vice-Director, who will be responsible for renewing existing funding, allowing the Director to focus on bringing on board new funders. This additional staff capacity for funding will be effectively used thanks to Eurodad's improved Fundraising Pipeline Planning System (A4.3), which will gradually move funders on Eurodad's hit-list to a position where grant applications are sent, and funding achieved.

Therefore, it is anticipated that the Action will gradually diminish as a percentage of Eurodad's total funding, as a diverse set of new funders comes on board and expanded renewals of existing funders increase. By the final half year of the project, it is projected that the funding of the Action will be restricted to a limited set of activities, including completing the final evaluation of the Action (4.2.10).

Institutional sustainability

The Action is designed to allow the continuation of results after the end of the Action in the following ways:

- *Building implementation into Eurodad's ways of working:* the capacity development initiatives in the Action are designed to integrate closely with Eurodad's day-to-day needs, rather than creating separate workstreams. For example, the Policy Advocacy and Communications Toolkit (A1.2) focuses during Years Two to Four of the Action on using the Toolkit to improve joint actions taken by members and Target Groups across Europe based on common strategies.
- *An expanded membership base for Eurodad:* the expansion of the network with new members in new EU member states (A2.2) will itself ensure continued ownership of the work of the network, given that Eurodad's governance means that members approve all strategies and workplans, and elect Eurodad's board.
- *A focus on monitoring, evaluation and learning (MEL):* both through the development and adoption of a new MEL Framework (A4.2.7) and through integration of this throughout all planning and evaluation activities (A4.2). In addition a mid-term evaluation (A4.2.8) and final evaluation (A4.2.10) will be designed to focus on the sustainability of Eurodad, including cementing the gains of the Action. The end of strategy evaluation will be focused on informing the development and of a new five-year strategy for Eurodad, which itself will ensure the continuation of the gains of the Action.
- *Reference materials that will stand the test of time:* A focus during Years One and Two of building the essential reference guides, such as the Policy Advocacy and Communications Toolkit (A1.2) and the Guidelines for Strategic Advocacy Planning (A1.1.1), which – having been developed with active participation of members, and based on adopting best practices from across the network – are designed to stand the test of time. Reviews and updates of these during the Action should mean that necessary improvements based on experience from usage are included.
- *A fundraising upgrade (A4.3) that will replace Action resources with other sources by the end of the grant,* in order to maintain the new higher level of resources needed for the Strategic Plan, as described above, meaning that the Eurodad secretariat will continue to operate at a high level of capacity into the future.

Policy level sustainability

Eurodad’s entire Strategic Plan is designed to create policy level sustainability, as it is targeted at improving the policies and practices of multilateral institutions. Rather than repeating the detail of how that Strategic Plan targets a wide range of policy level sustainability, choosing one example can help to demonstrate this point.

Eurodad’s Tax Justice issue area has three five-year goals, each of which is designed to embody policy level sustainability, as the following table shows:

Strategic Plan Goal	Policy Level Sustainability
The EU introduces binding regulation that effectively prevents tax avoidance by European companies, including public country-by-country reporting for all sectors.	This will improve EU legislation, through for example, an amendment to the Accounting Directive to introduce country by country reporting for all major companies.
A systematic reform of global tax standards towards a coherent, fair, effective, progressive, transparent system that directly supports development is initiated through a transparent, well-resourced, intergovernmental UN process where all countries participate on an equal footing.	This would be a major improvement to the global governance framework for setting norms and standards on tax, and would, for the first time, involve all countries of the world in the process. At present, the OECD-led process that is the centre of existing changes (known as the Base Erosion and Profit Shifting initiative) excludes over 100 of the world’s countries that are mostly from developing countries.
Tax justice campaigns and political pressure in individual countries all over the world are reinforced by a well-functioning, effective, transparent and democratic global tax justice movement.	The major gains that have been made (as set out in Eurodad’s annual reports and Strategic Plan) can only be maintained, and the additional policy and practices targeted achieved if public pressure is maintained – a well-functioning global tax movement made up of thousands of CSOs from around the world is critical to this.

Therefore, the capacity development initiatives embodied in this Action will help Eurodad to achieve its issue-based goals, including on new issues (A1.3), and therefore ensure policy level sustainability.

Environmental sustainability

Eurodad has a strict environmental policy, which focuses on reducing the environmental impacts of the two activities that have by far the most environmental impact for a policy and advocacy network like Eurodad: travel and printing. On travel, for example, Eurodad’s environmental policy mandates no plane travel for journeys less than eight hours (these trips should be made by train). On printing, Eurodad makes significant use of electronic methods of communication, but when printing is necessary, Eurodad uses post-consumer recycled paper. More importantly, the use of video and teleconferencing are encouraged, and the Strategic Plan envisages that these will be expanded as technology improves. However, this has to be balanced against the evident value for building network relationships of face-to-face meetings: this balance will be considered during the development of the Advocacy Planning Coordination System (A1.1), and Eurodad’s environmental policy will be updated, if necessary. However, the direct environmental impacts of the Action are limited compared to the potential environmental gains to be made if Eurodad can achieve the goals of the Strategic Plan, particularly Goal vi on Climate Finance.

Dissemination Plan to enhance multiplier effects

Work package	Possible multiplier effects	Dissemination channel
A1.1 Advocacy Planning Coordination System	<p>The Guidelines for Strategic Planning (A1.1.1) will be designed as a reference and training resource for Target Group organisations, which will be trained in their use. This will mean that improved advocacy coordination and planning will take place not just within the Eurodad network, but also within a much broader group of CSOs in Europe and worldwide.</p> <p>The on-going revision of the guidelines (A1.1.5 and A1.1.6) will ensure that they remain fresh and at the cutting edge of best practice, but also provides further opportunities to disseminate and ensure multiplier effects.</p>	<p>Training at least 710 staff from target organisations (A1.1.2) including on how to use the Guidelines to improve their own advocacy planning and coordination.</p> <p>Dissemination both through improved communications outreach (A2.1) – via the website and newsletter and to key segments of Eurodad’s target audience – and at all major Eurodad events, including the International Conference (A1.1.3) and Policy Forum (A1.1.4).</p>
A1.2 Policy, Advocacy and Communications Toolkit	<p>The Toolkit will be designed as an interactive learning and reference tool, and will be designed to link to other related products, helping to make it more useful to practitioners outside the Targets of this Action.</p> <p>Eurodad will build a community of practitioners within its network and broader target audience that are familiar with the Toolkit, and use it within their organisations to improve policy, advocacy and communications.</p>	<p>2,940 staff⁸⁶ from target audiences will learn from the Toolkit in the most practical way – while undertaking joint advocacy actions (A1.2.5).</p> <p>1,125 staff⁸⁷ from target audiences will be trained in the use of the Toolkit, allowing them to both learn and improve their own work, but also to promote the Toolkit within their organisations and wider networks.</p> <p>The Toolkit will be an online reference tool, publicly available, and Eurodad’s improved communications Outreach (2.1) will include disseminating this widely to CSOs outside of the Target Groups.</p>
A1.3 Strategies and Workplans for New Issues	<p>The workplans and strategies will be designed through working with existing organisations and networks and identifying how Eurodad can play a role that creates the greatest multiplier effect – i.e. how Eurodad can help to strengthen and expand the</p>	<p>Eurodad will base its workplans and strategies around strengthening and expanding the coalition for change, as the Strategic Plan mandates, and use the Guidelines for Good</p>

⁸⁶ This is a non-discrete number – i.e. it does not refer to 2,940 different staff, but 2,940 separate engagements, sometimes by the same staff.

⁸⁷ This is a non-discrete number – i.e. it does not refer to 1,125 different staff, but 1,125 separate engagements, sometimes by the same staff.

	coalitions for change in each area.	Strategic Planning (A1.1) and the PAC Toolkit (A1.2) to improve joint strategic planning and implementation.
A2.1 Communications Outreach Plan	<p>The essence of this work package is precisely to build multiplier effects – by encouraging organisations and staff from new or dormant organisations to engage with Eurodad issues, and begin to take action.</p> <p>In addition, Eurodad’s communications strategy identifies additional audiences beyond the targets of this action, including journalists, policy-makers and politicians across Europe, who will also benefit from the improvements in range and accessibility of Eurodad’s communications that result from this work package.</p>	Eurodad’s website will be upgraded (A2.1.3) and its ability to target specific segments of the audience will be greatly improved through the CRM upgrade (A2.1.2). Other communication channels will also be reviewed and improved including social media (A2.1.5) and newsletter (A2.1.4).
A2.2 New Members Recruitment Plan	The action of reaching out to new organisations and networks in new countries (A2.2.2) will itself have multiplier effects far beyond the eventual bringing on board of new Eurodad members, as it will expose a wide variety of organisations to Eurodad’s work, and lead to increased activity on Eurodad’s issues by those organisations.	<p>The greatly expanded knowledge of the organisations and networks that exist in European countries where Eurodad’s presence is weak or absent will be entered into the CRM system (A2.1.2), allowing Eurodad to greatly expand communications to new audiences.</p> <p>Extended visits to target countries (A2.2.4) will also allow for direct dissemination.</p> <p>Potential new members will be involved in other trainings and capacity development initiatives that Eurodad undertakes (such as A1.2.6).</p>
A3.1 Joint strategy development with global partners	Supporting strategic approaches by global coalitions will have multiplier effects both in terms of improved working by those coalitions (together and in each continent) but also in terms of bringing insights and approaches for Eurodad’s work in Europe.	Through Eurodad’s strategic planning systems (which will be upgraded through A1.1).
A3.2 Organisational Development support for DAD networks	Supporting the strengthening of these vital networks will ensure multiplier effects in those networks themselves, but also in the global coalitions (A3.1) of which they are an active part.	Through the DAD networks, and through making connections between these networks and Eurodad members.
A4.1 Recruitment of New Staff	The Strategic Plan’s emphasis on a strong and expanded secretariat was precisely in recognition of the multiplier effects the secretariat can have – helping to build capacity in members, partners and allies, and to inform and mobilise wide-reaching	The expanded secretariat will allow the implementation of this Action, and the realisation of the Strategic Plan, and is therefore important to all elements of this dissemination

	coalitions for change.	plan.
A4.2 Planning and Evaluations	This work package will improve all the work of the network, and all other work packages in this Action. In addition, the MEL framework (A4.2.6) will provide a useful tool that members and others may use to improve their own monitoring, evaluation and learning. Lessons learned in the strategy renewal and final strategy evaluations (A4.2.8 and A4.2.10) will also be carefully disseminated to members, to Target Groups and will be made publicly available so that other organisations can learn from them.	The MEL Framework will be disseminated to all members and partners, and will be used during trainings (for example A1.2.6). Key lessons from evaluations will be publicly available on Eurodad’s website and disseminated using Eurodad’s improved communications outreach (A2.1).
A4.3 Fundraising Pipeline Planning System	Strengthening the funding base of the secretariat will also involve greater collaboration on projects with members and partners – expanding their ability to do important work.	The concept notes (A4.3.2) will in many cases be jointly developed, meaning projects for future funding will be designed to enhance capacity in several organisations, particularly global partners (A3.1) and Eurodad’s sister DAD networks (A3.2).

Risk Management Plan

Eurodad’s Strategic Plan has a risk management framework focusing on the three major risks for the organisation over the next five years. This is summarised below, with reference to the activities in the Action that address these risks. An additional fourth risk that applies specifically to this Action has been added. The Vice Director will be responsible for tracking these risks and bringing any important or urgent issues to the regular project management teleconferences (A4.2.2) for the project. In addition this Risk Management Plan will be reviewed and updated at the annual project planning and evaluation meetings (A4.2.1).

Risk + Likelihood	Likely impact and management
Funding risks – changes in priorities of donors/ reduction in available funding reduces development finance funding. Likelihood: low	Medium/ high impact The fundraising strategy and plans have been developed with this risk in mind, focusing on revamping the funding pipeline system (A4.3) to greatly expand the number of donors the organisation has a connection with and hopes to engage with in the future. A Fundraising Coordinator will increase capacity, and a Vice Director will increase senior management time for fundraising (A4.1). However, the main key to success is to continue to deliver results, and communicate these effectively to donors, and improved capacities on advocacy planning (A1.1) and tactics (A1.2) resulting from the Action will be important. Expanding the scope of the network to new issues (A1.3) also expands the scope of funders that can be partnered with.
Major financial or economic crisis – significantly shifts priorities of multilateral organisations and governments targeted.	Medium / high impact This risk is anticipated within the Strategic Plan, which is why the organisation is taking a more flexible approach to enable it to adjust to a changing external environment. In addition, the strategic goals are in themselves the key to reducing the likelihood of future crises –

Likelihood: medium/high	so they will become more relevant should there be another crisis. The expansion of the range of issues covered by the new Strategic Plan (A1.3) means that the organisation remains relevant across the whole range of development finance issues, allowing it to respond more effectively.
CSO focus on development finance – members, allies and developing country partners shift their attention within development finance or away from development finance issues. Likelihood: low	<p>Medium/ high impact</p> <p>In many ways this is an inevitable part of Eurodad’s work, and one that the organisation is designed to cope with. Consultations with members informed the development of the new Strategic Plan thus ensuring that issues they approved Eurodad to work on fit within both their current and future priorities. During the strategy period some issues are likely to receive more attention from members or CSOs than other issues – the Strategic Plan’s flexible strategic approach will facilitate the secretariat being able to adjust its role accordingly.</p> <p>The Action is clearly aimed at these Target Groups, and contains a number of initiatives to help maintain or increase their focus on Eurodad issues. The expansion of the number of issues taken on by Eurodad (A1.3) increases this flexibility. Eurodad’s New Member Recruitment Plan (A2.2) and Communications Outreach Plan (A2.1) are designed to greatly improve Eurodad’s focus and capacity to proactively persuade more organisations to focus on, or deepen their attention to Eurodad’s issues. Finally, the major capacity development initiatives of the Action including the PAC Toolkit (A1.2) and Advocacy Planning Coordination System (A1.1) are designed to improve the delivery of results – in terms of policy changes – which is the surest way to ensure that Eurodad issues remain relevant and exciting for Target Groups.</p>
Action management risks – poor coordination, follow up or planning undermine the impact of the Action. Likelihood: very low	<p>Medium / High impact</p> <p>There are three main ways this risk will be managed. First, Eurodad’s rigorous recruitment process and excellent reputation will ensure excellent candidates for the key new positions that will lead the project management of the Action (A4.1), particularly the Vice-Director and the Network Development Officer.</p> <p>Second, Eurodad adopts a rigorous approach to project management, with clearly identified lead staff members for each activity and work package, and an identified quality assurance role assigned to a senior member of staff for each. Affiliates have been chosen because they have strong skills and experience to add in the work packages they are part of, and their role has been clearly defined.</p> <p>Third, the Action itself adopts a comprehensive planning approach, with a strong focus on monitoring, evaluation and learning (A4.2.)</p>

Pre-conditions and assumptions

The following assumptions and pre-conditions are summarised in the Logframe in the next section:

- *Policy change demands will lead to significant changes in the financial and economic system to have major impact on poverty eradication and human rights:* Eurodad’s issue-based goals, set out in its Strategic Plan, have been carefully chosen to bring about transformative change. For example, the Strategic Plan notes that “*debt stocks for developing countries have reached their highest level ever, and over 40 low-income countries are in debt distress or at risk of debt distress*”. Eurodad was established over 25 years ago precisely because of the devastating

effects that debt crises can cause for the poorest countries. Despite having won significant debt cancellation since then, the recurrence of the problem shows that more permanent solutions are needed, focused on a “*multilateral debt work out procedure that makes independent, fair and transparent decisions and is linked to the UN’s development and human rights agendas*”, which is one key goal of the Strategic Plan.

- *Coordinated civil society actions can influence European governments*: Eurodad’s annual reports outline the victories the network has won by influencing European governments, providing evidence that strategic interventions of the kind this Action shall work on, can create change. For example, in 2014 “...*following intense advocacy and campaigning work by Eurodad and partners, the three European Union institutions (Commission, Council and Parliament) agreed to create registers of the real or ‘beneficial’ owners of all major businesses, with access to the public in cases where there is a ‘legitimate interest’.*”⁸⁸ This is a major step forward in reducing illicit financial flows out of developing countries, as hidden ownership provided easy routes, for example, for laundered money to flow out of developing countries undetected.
- *There are civil society organisations interested or working on development finance policy in all EU Member States*: Eurodad has, through the various coalitions it helps coordinate, including Tax Justice-Europe and EuroIFI, had connections with active organisations in all EU member states in the past.
- *Sufficient resources and interest from developing country partners to join global coalitions*: Eurodad’s approach to working with developing country partners is based, as the Strategic Plan sets out, on only working on issues that the organisation has “*support from members and partners from developing countries to work on*”. In addition, Eurodad already works in several coalitions with partners from developing countries, and the Action is designed to strengthen this practice (A3.1 and A3.2).
- *Funders remain interested in supporting development finance advocacy*: In addition to the donors Eurodad already has, Eurodad’s Fundraising Pipeline Planning System (A4.3) identifies a strong hit list of potential future funders that already fund organisations working on similar issues to Eurodad.

2.2.2.5 Logical Framework

See attached Annex.

⁸⁸ Eurodad (2015) *Eurodad Annual Report 2014* <http://eurodad.org/files/pdf/557ecbdba973a.pdf>

2.2.2.6 Budget, amount requested from the Contracting Authority and other expected sources of funding

The budget of the Grant is:

- EUR 5,669,736 for the total duration of the action; and
- EUR 1,745, 792 for its first 12 months;

Eurodad has designed this Action with the affiliates, and agreed the associated budget to deliver an excellent ratio between estimated costs, and the very considerable results described above.

The budget has been carefully designed to ensure that all the activities of the Action are appropriately reflected, and that quantities and costs reflect what is necessary and sufficient to implement them successfully, taking into account other resources available across the network. Full details can be found in Annex to this application, including a justification for each item.

The amount requested from the Contracting Authority is EUR 4,535,789, with the rest being provided as co-funding from other resources from Eurodad and affiliates.

No contributions in kind will be provided.

3. The applicant

3.1 Identity

EuropeAid ID number ⁸⁹	BE-2010-FII-1201683206
Name of the organisation	European Network on Debt and Development (Eurodad)
The applicant's contact details for the purpose of this action	Rue d'Edimbourg 26, 1050 Ixelles, Brussels, Belgium
Legal Entity File number ⁹⁰	6000270201
Abbreviation	Eurodad
Registration number (or equivalent)	0850769479
Date of registration	24 June 2005
Place of registration	Belgium
Official address of registration	Rue d'Edimbourg 26, 1050 Ixelles, Brussels, Belgium
Country of registration ⁹¹ / Nationality ⁹²	Belgium/Belgian
Website and E-mail address of the organisation	www.eurodad.org and email: grants@eurodad.org (copy to assistant@eurodad.org)
Telephone number: Country code + city code + number	+ 32 2 894 46 40
Fax number: Country code + city code + number	N/A

The Contracting Authority must be notified of any change in addresses, phone numbers, fax numbers and e-mail, in particular. The Contracting Authority will not be held responsible in the event that it cannot contact an applicant.

⁸⁹ This number is available to an organisation which registers its data in PADOR. For more information and to register, please visit http://ec.europa.eu/europeaid/work/onlineservices/pador/index_en.htm. This information does not need to be provided in case of calls where the European Commission is not the Contracting Authority.

⁹⁰ If the applicant has already signed a contract with the European Commission.

⁹¹ For organisations.

⁹² For individuals.

4. ADDITIONAL CO-APPLICANT(S) WHICH WERE NOT PART OF THE FPA

There are no co-applicants.

5. AFFILIATED ENTITY(IES) PARTICIPATING IN THE ACTION

Sections 5.2 and 5.3 must be completed for each affiliated entity within the meaning of Section 2.1.2 of the Guidelines for Applicants. You must make as many copies of this table as necessary to create entries for each additional affiliated entity.

5.1 Identity

	Affiliated entity no.1
EuropeAid ID number⁹³	GB-2007-CRX-2711164870
Full legal name	ActionAid UK
	Affiliated entity no. 2
EuropeAid ID number	NL-2007-DSM-2711396080
Full legal name	Stichting Both ENDS
	Affiliated entity no. 3
EuropeAid ID number	IE-2008-CTF-0307464241
Full legal name	Debt & Development Coalition Ireland Ltd. – DDCI
	Affiliated entity no. 4
EuropeAid ID number	HU-2008-CVO-0303971602
Full legal name	Foundation for Development of Democratic Rights – DemNet
	Affiliated entity no. 5
EuropeAid ID number	SI-2008-BGM-1103013252
Full legal name	Ekvilib Inštitut – Ekvilib Institute
	Affiliated entity no. 6
EuropeAid ID number	DE-2008-BER-1107489173
Full legal name	erlassjahr.de – Entwicklung braucht Entschuldung e. V.
	Affiliated entity no. 7
EuropeAid ID number	CZ-2008-CCA-1606360095
Full legal name	GLOPOLIS O.P.S.
	Affiliated entity no. 8
EuropeAid ID number	DK-2007-DSB-2711378147
Full legal name	OXFAM-IBIS
	Affiliated entity no. 9
EuropeAid ID number	PL-2010-CUH-1606031493

⁹³ This number is available to an organisation which registers its data in PADOR. For more information and to register, please visit http://ec.europa.eu/work/europeaid/onlineservices/pador/index_en.htm. This information does not need to be provided in case of calls where the European Commission is not the Contracting Authority.

Full legal name	Instytut Globalnej Odpowiedzialności – IGO
	Affiliated entity no. 10
EuropeAid ID number	ES-2008-BFM-2603066216
Full legal name	Xarxa Observatori del Deute en la Globalització – ODG
	Affiliated entity no. 11
EuropeAid ID number	IT-2012-FWZ-2604717919
Full legal name	Re:Common
	Affiliated entity no. 12
EuropeAid ID number	NL-2007-DOM-2711209371
Full legal name	Stichting Onderzoek Multinationale Ondernemingen – SOMO
	Affiliated entity no. 13
EuropeAid ID number	DE-2007-DOP-2711221689
Full legal name	Weltwirtschaft, Ökologie & Entwicklung – WEED e.V.

5.2 Description of the affiliated entities

Present the organisation, including information on its establishment and legal status, mission statement and domains of competence, internal governance (institutional structure, decision process, internal mobility, etc.)

Affiliated entity no. 1	ActionAid (ActionAid UK is the ActionAid International affiliate and member of Eurodad taking part in this Action)
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Establishment and legal status

Registered charity number 274467 and a company limited by guarantee registered in England and Wales no. 1295174. ActionAid UK is a non-profit making organisation.
Nationality/Country and date of registration: UK, 1977.

Mission statement

ActionAid UK (AAUK) is an affiliate of ActionAid International (AAI) whose mission is to work with poor and excluded people to eradicate poverty and injustice, and is responsible for linking with and providing support to country programmes. AAI has a vision of a world without poverty and injustice in which every person enjoys their right to a life of dignity. AA has since grown to an international federation of 45 members who, using a Human Rights Based Approach (HRBA) to development, work with over 15 million people for a world free from poverty and injustice. Education, women's rights and governance are amongst AA's strategic priorities.

Domains of competences

ActionAid has five key thematic areas of focus: women's rights, education, governance, livelihoods and emergencies. Advocacy is a core element of all AAI programmes.
AAI has pioneered the use of participatory methodologies such as Participatory Vulnerability Analysis and UNESCO award-winning REFLECT, which ensures people living in poverty are involved in their development.

AAI's participatory, rights-based approach and expertise in using participatory methodologies ensures the work is driven towards local, national and global-level change. Reflection-Action is ActionAid's integrated participatory methodology and is the foundation for the work with communities. It draws on the best from various participatory approaches, which have been harmonised into a single methodology in order to better support our work at all levels.

AAI's approach to relief and development work is underpinned by three key elements: empowerment, campaigning and solidarity.

ActionAid's approach:

- Empowers excluded groups by building their communication skills, raising their awareness of power and rights, supporting grassroots organisations and strengthening social movements.
- Strengthens solidarity by connecting and organising people committed to a common cause, linking groups in countries, across borders and between social classes to build up the power needed to change policies and practices.
- Campaigns to shift national and international policies and practices. Our campaigning accelerates policy change and we are committed to developing innovative approaches that connect our supporters closely to our work.

ActionAid recognises poverty as a violation of human rights and believes that people make change happen and that taking a rights-based approach is the most effective and sustainable way of reducing poverty and discrimination. AAI's HRBA approach to development centres on transforming power relations in every community and country where we work. Women are central to our HRBA and women's rights are embedded throughout our programming and campaigning. We aim to confront the violation of women's rights and the inequality between men and women in access to services, resources and power.

Internal governance (institutional structure, decision process, internal mobility, etc.)

AAUK's Board of Trustees are responsible for the overall governance of AAUK and are Directors for the purpose of company law. The Trustees of the Board each bring their own unique set of skills and experience to the organisation.

Formally, the Board delegates responsibility for management to the Executive Director (Girish Menon), who in turn delegates specific responsibilities to Directors in the Senior Team and, through them, to those reporting to them.

AAUK consists of five departments – Communications, Fundraising, Policy & Campaigns, Finance & Central Resources and Performance & Accountability.

ActionAid trustees, chief executives and country directors are members of the ActionAid International Board and General Assembly. ActionAid International has a two-tier governance structure composed of a General Assembly, as the overarching body; and a Board responsible for the regular governance of the organisation.

The overall governance of the organisation rests with the General Assembly and the General Assembly delegates powers of governance to the National Board, which in turn is accountable to the General Assembly. A two-tier governance structure is emphasised by ActionAid International because it encourages wider participation of the people (mostly poor and excluded people in the south and the supporter constituency in the north) in the governance of the organisation; and it ensures greater accountability.

ActionAid International also recommends that members, where possible, have a two-tier governance structure and strive to ensure a healthy combination of expertise and diversity within member boards by considering factors of nationality, age, gender, race, skill, experience and qualifications. ActionAid trustees are selected on a broad range of criteria:

- They need to believe in and share ActionAid's values, vision, mission and strategy;
- They should be able to work at a governance or policy-making level;
- They should have demonstrated the ability to function effectively as part of a diverse strategic group;
- They should have specific functional expertise of relevance to the organisation, e.g. poverty, human rights, development, women's rights, media and communications, fundraising, campaigning and advocacy, finance, management, Human Resources, Information Technology or government;

- They bring diversity to the Board in dimensions such as gender, ethnicity, country/regional perspective within the UK, style, background and age;
- Conflicts of interest and duty are manageable;
- They see clear benefits to themselves;
- They have the time.

AA federation members work together to deliver programmes to alleviate poverty. Country programmes are supported by members in Europe, Australia, the US and by the International Secretariat, all of which are unified by a five-year International Strategy. Country Directors and equivalents report to their national boards and/or the International Secretariat, depending on whether they are legally independent. All members vote at the Annual General Meeting.

The development of ActionAid's governance structure and federal nature is progressive, based on democratic principles and giving all member countries a 'voice and vote' through the International Assembly. All members have a say in determining the direction of the wider federation, including setting the International Strategy and strategic framework within which all countries operate.

Please list the projects managed by your organisation in the last three years which demonstrate your organisation's technical, operational and financial capacity to manage the type of grants mentioned in the guidelines for applicants.

1) Project title: Mobilising European citizens to place inequality and tax justice at the heart of the European development agenda during EYD2015 and beyond

Cost of the action (EUR): €5,800,000

Location of the action: 16 EU MS + Nigeria, Peru, Zambia

Partners: 22 co-applicants and 8 associates

Donor: EC

Dates: 1/3/2015 – 30/5/2017

2) Project title: Send my friend to school: learning about the right to education and how to contribute to change within a democracy

Cost of the action (EUR): €1,333,333

Location of the action: Greece, Romania, Spain, United Kingdom, Nigeria

Partners: 4 partners

Donor: EC

Dates: 01/01/2013 – 31/12/2016

3) Project title: Strengthening IFSN Regional Food Security Networks to help eradicate hunger in developing countries through advancing food and nutrition security in regional and global political agendas

Cost of the action (EUR): €2,666,667

Location of the action: 31 countries in Asia, Africa, Americas and Europe, including Afghanistan

Partners: 11 partners

Donor: EC

Dates: 1/4/2013 – 31/3/2017

4) Project title: Enhancing poor and excluded women's access to and control over land as a strategy for empowerment and fighting hunger

Cost of the action (EUR): €1,178,933

Location of the action: Guatemala, India, Sierra Leone

Partners: 5 partners

Donor: EC

Dates: 2.11.2010 – 1.11.2013

5) Project title: Strengthening women's collectives in India, Nepal and Bangladesh

Cost of the action (EUR): €1,875,000

Location of the action: India, Nepal, Bangladesh

Partners: 7 partners

Donor: EC

Dates: 1/4/2013 – 31/3/2016

6) Project title: Promoting quality education through progressive domestic resource mobilisation

Cost of the action (EUR): €3,800,000
 Location of the action: Malawi, Mozambique, Tanzania, Nepal, Ethiopia, Myanmar
 Partners: 9 partners
 Donor: NORAD
 Dates: 1/1/2015 – 31/12/2017

7) Project title: Programme Partnership Arrangement 2011-2016 to ensure that poor and excluded people (with specific focus on women and girls) are active in ensuring positive policy and budgetary change and that duty bearers are accountable, transparent and provide quality in universal service delivery at local, regional and national levels

Cost of the action (EUR): €28,740,000
 Location of the action: Ethiopia, Afghanistan, Pakistan, Uganda, Nigeria and Ethiopia are they main PPA countries. Pilot projects implemented in Cambodia and Nepal.
 Partners: 5 national partners + implementing partners in each country
 Donor: DFID
 Dates: 1/4/2011 – 30/3/2016

8) Project title: Making her own choices: Young Urban Women Programme

Cost of the action (EUR): €2,988,774
 Location of the action: Ghana, India, South Africa
 Partners: 3 national partners + implementing partners in each country
 Donor: Human Dignity Foundation and NORAD
 Dates: 01/07/2013 – 30/06/2016

Affiliated entity no. 2	Both ENDS (Stichting Both ENDS)
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Establishment and legal status

Stichting Both ENDS was established in Amsterdam as a Foundation under Dutch law on 20 December 1990.

Mission statement

Both ENDS works in partnership with environmental justice groups from poor and developing countries towards a global economy and society that is inclusive and sustainable.

Domains of competences

Both ENDS is an independent organisation with knowledge and expertise in areas related to the challenges involved in the management of natural resources and livelihood development, especially in the areas of international capital flows, sustainable land use and water management. Both ENDS works with extensive networks of Southern and Central European and Central Asian partner organisations in all these three domains. Some of the joint work has a significant overlap with the focus areas of Eurodad.

Internal governance (institutional structure, decision process, internal mobility, etc.)

Within this structure, Both ENDS is organised with limited hierarchy while professional team members operate in project teams. In some projects they are regular team members, while in other projects they may serve as project leaders and managers. The board of Both ENDS consists of three people at a minimum, who serve for a maximum of two consecutive periods of 4 years. New board members are appointed by the board, in consultation with the director. Both ENDS is an equal opportunity organisation.

Please list the projects managed by your organisation in the last three years which demonstrate your organisation's technical, operational and financial capacity to manage the type of grants mentioned in the guidelines for applicants.

1) **Project title: Democratising energy for development: mobilising public support for fair energy relations and democratising the process regarding the EU Common External Energy Policy to develop a coherent, just and sustainable European policy**

Beneficiary applied together with Bankwatch and received funding from the EU Commission, DG for Development and Cooperaton – EuropeAid. Grant Application No. DCI NSA-ED/2011/85 submitted to the EU Commission, DG Development by Bankwatch, where Beneficiary acts as partner. The contract for financing of the Project signed between Bankwatch and the EU Commission, DG Development, DCI-NSAED/2012/281-964, 31 December 2012.

2) **Project title: Bringing new citizens' voice to EU decision-makers**

Beneficiary applied together with Counter Balance and received funding from the Education, Audiovisual and Culture Executive Agency, acting under powers delegated by the Commission of the European Union. Grant Application No. 533882-EFC-1-2012-1-CZ-EFC-CP submitted to the Education, Audiovisual and Culture Executive Agency by Counter Balance, where Beneficiary acts as partner. Contract/Grant Decision for financing of the Project signed by Education, Audiovisual and Culture Executive Agency, Nr 2012-3805 / 001 - 001, 20 September 2012.

3) **KR Foundation, Denmark. Project title: Climate for Improvement – Challenging Export Credit Agencies' hidden role in keeping the fossil fuel sector afloat.**

Signed 13 May 2015. Project period: 1 July 2015 – 31 December 2016.

4) **C.S. Mott Foundation, United States. Project title: Multilateral Financial Institutions Program 2015-2016.**

Aim: to strengthen Both ENDS' work on IFIs in the project period, continuing the work on the World Bank Safeguard Policy Review, building increased capacity of our partners working in the regions and preparing a possible transition to address new developments, quickly expanding financial institutions in emerging economies.

Affiliated entity no. 3	DDCI (Debt & Development Coalition Ireland Ltd. – DDCI)
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Establishment and legal status

Debt & Development Coalition Ireland Ltd. – DDCI was established as a company limited by guarantee (Company Registration No. 216006) in Dublin, Ireland under the Companies Act, 1963, on 20 March 1994.

Mission statement

DDCI is a national network and operates collaboratively with a wide range of actors in Ireland, Europe and in countries of the Global South on tax and debt issues.

Domains of competences

DDCI was a partner organisation in the economic justice programme for a nine-year EC-funded programme from 1994-2005, and two separate three-year EC-funded programmes from 2013-2015. DDCI is a signatory to the Dochas Irish development NGO code of corporate governance.

Internal governance (institutional structure, decision process, internal mobility, etc.)

DDCI is governed by a voluntary board comprised of representatives of DDCI member organisations and a maximum of two individual members providing additional expertise. Board members have served an average of three years and there is regular transition of board members. DDCI's annual accounts are externally audited.

Please list the projects managed by your organisation in the last three years which demonstrate your organisation's technical, operational and financial capacity to manage the type of grants mentioned in the guidelines for applicants.

DDCI’s programme of work over the past three years has involved three key strands of work and is partly supported by the Irish Department of Foreign Affairs, the European Commission, a number of other civil society and trade union donors and DDCI’s own members.

1) Project 1: To build Irish Government and parliamentary support for fairer international finance through increased debt cancellation for Southern countries, including the cancellation of illegitimate debts of the Global South, and to build Irish parliamentary support for fairer international tax justice.

- Publication of evidence-based research analysing Irish government policy in these areas;
- Influencing members of parliament (Ireland and EU);
- Influencing government officials and Irish officials of international financial institutions;
- Publishing major media commentaries and press stories.

2) Project 2: To strengthen critical perspectives in Ireland on debt justice by delivering high-quality development education in the adult informal and post-primary sectors.

- Building sound pedagogical techniques for education on issues of economic and financial justice;
- Developing methodologies which link local and global perspectives on debt justice in order to enhance relevance of Global South issues with an Irish audience;
- Producing educational resources for both formal and adult learners;
- Turning learning into action through engagement of education participants in activism.

3) Project 3: To strengthen the radical debt justice movement in Ireland by deepening and expanding the engagement of DDCI’s organisational and individual members with our campaign objectives, and by strengthening our participation in other relevant alliances.

- Development of innovative campaigning techniques that enhance citizen engagement in advocacy;
- Strengthening links between activists in the Global South and in Ireland;
- Dedicating resources to developing new, creative campaigns and advocacy techniques that appeal to and are used by our members and allies;
- Building sustainable advocacy by developing voluntary, as opposed to exclusively NGO, participation in campaigns and advocacy.

In DDCI’s independent evaluations, it has been found by government, civil society and representatives of international financial institutions such as the World Bank and IMF to be a highly credible network working on debt- and tax-related issues.

Affiliated entity no. 4	Demnet (Foundation for Development of Democratic Rights – DemNet)
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Establishment and legal status

The Foundation for Development of Democratic Rights (DemNet Hungary) was founded in Budapest in March 1996 (national registration number: 6006) as a legal entity (foundation).

Mission statement and domains of competences

Since its establishment, DemNet has been providing democracy support with a special focus on civil society development and capacity building in the countries of the Balkan region and in the Eastern Partnership countries. Since Hungary’s EU accession in 2004, DemNet has also been extensively involved in influencing international development policies in Hungary. DemNet was one of the founding members of the Hungarian National NGDO platform. The Foundation has been partners to several large-scale pan-European and regional projects funded by the EU and the International Development Fund as well.

Internal governance (institutional structure, decision process, internal mobility, etc.)

The Foundation is governed by the Board, currently chaired by Thomas Donovan.

Please list the projects managed by your organisation in the last three years which demonstrate your organisation’s technical, operational and financial capacity to manage the type of grants mentioned in the guidelines for applicants.

Most relevant projects 2012-2015:

1) Project: V4Aid – United Support to the Millennium Development Goals

Donor: European Commission

Period: 1 February 2011 – 31 January 2014

Budget: €1,109,369 (DemNet's budget: €169,622)

Objectives: The overall objective of the project was to increase the potential and to improve the performance of the Visegrad 4 countries (Poland, the Czech Republic, Slovakia and Hungary) in international cooperation and strengthen their ODA contribution towards the achievement of the Millennium Development Goals.

2) Project: Mobilising European citizens to place inequality and tax justice at heart of the European development agenda during EYD2015 and beyond

Donor: European Commission

Period: 1 April 2014 – 31 March 2016

DemNet's budget: €108,390

Objectives: To raise awareness and support for the global role of the EU in combatting tax avoidance and evasion and in promoting progressive and equitable tax reform. It will provide the impetus for reform at national pan-European and global level to take particular account of the needs and interests of developing countries.

3) Project: FIT and CONNECT in the Caucasus! – Fostering sustainable civil society through cooperation

Donor: International Visegrad Fund's V4EaP Flagship Project

Period: 1 January 2013 – 30 April 2014

DemNet's budget: €47,627

Objectives: To develop sustainable civil society in four countries (Armenia, Azerbaijan, Georgia and Moldova) using V4 sector development experience with an indirect objective of strengthening regional cooperation in the Caucasus and deepening EaP-V4 relations.

4) Project: Addressing illicit capital flight for policy coherence for development

Donor: European Commission

Period: 1 January 2013 – 31 December 2015

DemNet's budget: €24,475

Objectives: The objective of the project is to strengthen public awareness on the effects of illicit capital flight on the achievement of the MDGs in order to trigger policy change for enhanced coherence of EU trade and finance policies with development objectives.

5) Project: EEA/Norway Grants NGO Fund

Donor: Norway, Iceland, and Liechtenstein

Period: October 2012 – September 2017

DemNet's budget: €296,445

Objectives: The overall objective of the Hungarian NGO Fund is to strengthen civil society development and enhance contribution to social justice, democracy, and sustainable development.

6) Project: The Swiss-Hungarian NGO and Scholarship Funds

Donor: Switzerland

Period: 11 August 2012 – 11 July 2015

DemNet's budget: €78,152

Objectives: The aim of the NGO FUND is to strengthen and increase the capacity of NGOs in the social and environmental field.

Affiliated entity no. 5	Ekvilib Inštitut – Ekvilib Institute
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Establishment and legal status

Ekvilib Institute, established in 2003, is a Slovenian private non-profit non-governmental organisation.

Mission statement

Ekvilib is active in the fields of social responsibility, human rights and development cooperation.

Domains of competences

In the scope of Ekvilib activities, we encourage and support policies and practices that contribute to social responsibility of all actors in global development and to a higher encouragement of human rights for all people – employing, exploring and fostering creative and innovative methodologies and practices. All of Ekvilib's activities are directed towards achievement of social change and promotion of human rights and are supporting and facilitating engagement in global processes and issues.

Internal governance (institutional structure, decision process, internal mobility, etc.)

Ekvilib Institute currently employs six people and has active cooperation of more than ten external experts and volunteers. We have a number of organisational experiences and all our employees have a broad background, with competences in the field of financial management and monitoring of European and national projects, advocacy, consultation, lecturing, PR; they include experts in the area of human resources, diversity, and prevention of corruption. Ekvilib staffs have experience in project management, event management, collaboration, integration and inclusive work with a variety of stakeholders. Ekvilib is one of the first NGOs in Slovenia with a sustainability report, according to GRI Guidelines; this transparent work is reflected in our Plan of integrity.

Please list the projects managed by your organisation in the last three years which demonstrate your organisation's technical, operational and financial capacity to manage the type of grants mentioned in the guidelines for applicants.

In the past three years, Ekvilib Institute has continued a decade-long tradition of having acted as a partner or coordinator of several international and national projects, which included also organisations and contacts from the Balkan region and beyond, and international projects in the field of tax justice. The majority of the projects were partially or in full funded by EU, US or national agencies.

The list includes:

1) Project title: Tax Justice Together

Donor: EC

Dates: 2015 – 2017

Description: Ekvilib Institute acts as one of 24 project partners. Project's objective is to promote fair and equitable tax reform as a driver for inclusive and sustainable growth, to reduce poverty and inequality, and to promote fairer relations between developed and developing countries, in the context of the post-MDG consensus by increasing EU citizens' critical understanding and active engagement, alongside campaigners in the Global South.

The application builds on the project in several ways, among others by building on the project's broader awareness raising campaign by identifying potential active organisations in the fields related to development finance.

2) Project title: Illicit Capital Flight

Donor: EC

Dates: 2013 – 2015

Description: Ekvilib Institute acts as one of 12 project partners. The project's overall objective is to strengthen EU public awareness and mobilisation on the effects of illicit capital flight on achieving the MDGs, in order to mobilise political support both at national and at EU level for enhanced coherence of EU policies with development objectives.

The application builds on the project in several ways, among others on the strengthening the relationships built during the project in Slovenia with national and EU decision-makers, other NGOs and media; increasing the activity on issues Ekvilib Institute is active on and broadening its active participation on other issues related to debt, development finance and poverty reduction.

3) Project title: Time for women's rights and gender equality in Montenegro

Donor: Slovenian Ministry of Foreign affairs

Dates: 2014 – 2016

Description: Project partner in Montenegro: Public Policy Institute Podgorica. Ekvilib Institute acts as a project coordinator. Overall objective is to increase the level of awareness of the importance of

addressing of women's rights and gender inequalities in the public and among political actors in Montenegro. The project demonstrates Ekvilib Institute's established connections and relationships in Montenegro among CSO and public institutes.

4) Project title: CSR Award scheme

Donor: EC

Dates: 2012 – 2013

Description: Award scheme for promotion of corporate social responsibility in Europe. Ekvilib Institute acted as a project partner, other project partners included among others: Croatia (HR BCSD), Greece (The Hellenic Network for CSR), Kosovo (CSR Kosovo), Macedonia (Zenith Macedonia), Montenegro (Association for Democratic Prosperity – ZidSerbia (SMart Kolektiv).

The project demonstrates Ekvilib Institute's established connections and relationships in South East Europe among different NGOs and national networks.

5) Project title: ACT RIGHT: Youngsters for Human Rights

Donor: Swiss Contribution

Dates: 2012 – 2013

Description: Ekvilib Institute acted as a project coordinator. Project ACT RIGHT aimed at encouraging young people to actively engage in the field of human rights. As part of the more than 40 young activists attended two intensive schools on ESC Rights; ActRight activist club has been created as a platform and structure for young people to meet and engage in human rights issues through different ways; through mentorship and co-training, young people acted as trainers on ESC rights and co-wrote manual on ESC rights from young people for young people; project supported young people in co-writing several chapters of a shadow report on ESC rights in Slovenia, which has been submitted to the Committee on ESC rights in Slovenia. The project demonstrates Ekvilib Institute's network building capacities.

6) Project title: Youth Leadership Program with Central Europe 3 cycles

Donor: United States Department of State: State: Bureau of Educational and Cultural Affairs

Dates: 2011 – 2013

Description: Summer exchange programme for high school students from each of participating countries: Slovenia, Serbia, Hungary, and Slovakia. Students attended a four-week programme in the USA and a follow-up programme in Serbia. The project demonstrates Ekvilib Institute's established connections and relationships in Central and South East Europe.

7) Project title: Young people for inter-ethnic understanding and sustainable development through sport and ecology

Donor: Slovenian Ministry of Foreign Affairs

Dates: 2011 – 2013

Description: Ekvilib Institute acted as a project coordinator. Project partners: Sports Union of Slovenia, GARD (Macedonia). The project was based on the acceptance of diversity among young people from different ethnic groups in Macedonia through sport and group activities in nature. The goal was to raise awareness about inter-ethnic cooperation among primary and secondary school students and enable them to recognise and accept their peers of other ethnic and religious backgrounds and cultures. The project demonstrates Ekvilib Institute's established connections and relationships in Central and South East Europe.

8) Project title: Youth for Human Rights: Against Discrimination

Donor: EU Youth in Action Programme and Small Grants Program American Embassy in Slovenia

Dates: 2011 – 2013

Description: The project focused around training and support in the field of anti-discrimination for youth workers from five West Balkan countries (Bosnia and Herzegovina, Montenegro, Kosovo, Serbia and Slovenia), who wanted to improve their knowledge in this field for their work with the youngsters. The training emphasised different manifestations of discrimination, highlighting good practices and methodological approaches to youth work and also included a round table discussion on some of the greatest challenges of youth work in the field of antidiscrimination and was conducted by experts from all the participant countries. The project has been selected as one of the best practice projects by the national agency. The project demonstrates Ekvilib Institute's established connections and relationships among CSOs in Central and South East Europe.

Affiliated entity no. 6	Erlassjahr.de (erlassjahr.de – Entwicklung braucht Entschuldung e. V.)
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Establishment and legal status

erlassjahr.de is a registered association under German law and recognised as a charitable non-profit organisation (in the German association register with the number VR 9071). It was established in 2001.

erlassjahr.de (Jubilee Germany) is a German non-governmental organisation with around 650 supporting organisations that support erlassjahr.de's drive for a fair and transparent international insolvency framework. These supporting organisations include non-governmental organisations, national churches, dioceses, one-world shops, development groups and other civil society actors.

Mission statement

Mission statement: erlassjahr.de wants to achieve that:

- poor countries can receive debt cancellation in a fair and transparent process, instead of depending on the good will and mercy of their creditors;
- external debt, that was created while disobeying international legal standards and that obstruct the achievement of internationally agreed development goals, can be cancelled,
- standards for responsible lending and borrowing will be developed and implemented, in order to codify the joint responsibility of debtor and creditor.

Domains of competences

erlassjahr.de strives to combat poverty in developing countries, as well as establishing just economic and financial relations by fighting for comprehensive relief of external debt and responsible borrowing and lending. Furthermore it strives to foster international justice through striving for a fair and transparent sovereign debt workout. erlassjahr.de is involved in a global network of similar campaigns and organisations.

The work of erlassjahr.de takes place at four levels. Firstly, we observe political developments and inform decision-makers. Along with initiatives from indebted countries, we support to establish realistic solutions for debt cancellation, that can enable a self-determined and sustainable development.

Secondly, we inform target groups with different levels of knowledge as well as the public in an appropriate manner about debt in the context of our development education.

Thirdly, we undertake advocacy work on the national and international level, inform decision-makers about debt policies and the realities on the ground in indebted countries and pressure decision-makers according to our mission.

Finally, we bring our demands to the public and media by organising campaigns and public actions.

Internal governance (institutional structure, decision process, internal mobility, etc.)

erlassjahr.de is governed by two central organs. The steering group, which is equivalent to the executive board of the association (e. V.), holds decision-making power. The executive board is the legal representative of the association erlassjahr.de e.V. The executive board/steering committee (consisting of five members) is elected from the members of the General Assembly (also called, freely translated from German, an association council). The association council includes 18 elected members of the broad membership of erlassjahr.de. The council is responsible for the strategic orientation of the erlassjahr.de and the consultation of the secretariat. The council is equivalent to the members of the legally registered association (e. V.). The General Assembly, which consists of the 18 elected members in the association council, will decide about entrance and withdrawal of members to and from the registered entity. The General Assembly also elects the five executive board members, relieves the executive board at the end of the year, assesses and adopts the annual report and decides about changes to the statutes. Besides these two organs, there is a full-time secretariat, implementing the annual workplan and the strategic orientation. The secretariat is reporting to the executive board and the executive board to the General Assembly. The secretariat consists of three female and one male employee.

Please list the projects managed by your organisation in the last three years which demonstrate your organisation’s technical, operational and financial capacity to manage the type of grants mentioned in the guidelines for applicants.

All projects are usually conducted and implemented in cooperation and with the support of members of erlassjahr.de. Depending on the project and its aims and content, partners external to the membership of erlassjahr.de are sought for the implementation of the project. However, usually, the organisational and technical implementation of the grant is fully in the hands of erlassjahr.de. In the following, the projects, managed by erlassjahr.de in the last three years will be summarised:

In 2015, nine projects, related to national development education and information initiatives and campaign activities, in line with the mission of erlassjahr.de, were managed with grants of the total amount of €78,000. Partners and grant-providers were national and development-based, such as the Catholic Fund for Development Education and Publicity, Aktion Hoffnung, Kindernothilfe, Aktion Selbstbesteuerung und Entwicklungspolitik, Stiftung Umverteilen, WEED, Bistum Münster and Afrikamissionare Weiße Väter. Furthermore. Part of the above-mentioned amount relates to public funds from the German development ministry.

In addition, five projects, related to advocacy, outreach and capacity-building and consultancy, in line with the mission of erlassjahr.de, were managed with grants of the total amount of €48,350. Partners were the German Protestant Agency for Development, the Friedrich Ebert Foundation, UNCTAD, Eurodad and the Global Fund for Tuberculosis, AIDS and Malaria. In the following two projects of 2015 shall be explained in more detail.

- **Project title: Looming new debt crises and the engagement for a sovereign debt workout**
Project for the period 1 January until 31 December 2015 on development education, capacity building of development initiatives on the issue of sovereign debt crises and the implementation of campaign activities targeted at the G7 Presidency 2015. The project included the organisation of different types of events and training seminars on different topics in the field of sovereign debt, which were organised with partners from Germany in the field of development advocacy and education. Furthermore, the project included the planning and implementation of campaign and advocacy actions along with partners from the membership of erlassjahr.de. Volume of the project: €78,563, grant: €50,000.”
- **Project on advocacy for a sovereign debt workout in national and international fora** as well as outreach to critically indebted country governments and consulting them on alternatives to solving a potential debt crisis. Volume: €20,000 Euro. Period: 1 December 2014 to 31 December 2016. Partner: Bread for the World, the Protest Agency for Development in Germany.

In 2014, eight projects, related to national development education and information initiatives were managed with grants of the total amount of €59,350, such as an exhibition on sovereign debt crises, events on different aspects of debt crises, etc. Partners and grant-providers were national and development-based, such as the catholic fund for development education and publicity or Kindernothilfe and came from public funds from the German development ministry.

In addition, three projects, related to advocacy, outreach and capacity-building and consultancy, were managed with grants of the total amount of €46,640. Partners were the German Protestant Agency for Development, Adveniat, the Friedrich Ebert Foundation, UNDP, Eurodad and the Global Fund for Tuberculosis, AIDS and Malaria.

In 2013, seven projects, related to national development education and information initiatives were managed with grants of the total amount of €51,250. Partners and grant-providers were similar to 2014.

In addition, five projects, related to advocacy, outreach and capacity building, networking, production of studies and consultancy, were managed with grants of the total amount of €26,450. Partners were Adveniat, the Friedrich Ebert Foundation, Eurodad, the Global Fund for Tuberculosis, AIDS and Malaria and the Alliance Sud Switzerland.

Affiliated entity no. 7	Glopolis (GLOPOLIS O.P.S.)
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Establishment and legal status

Founded in 2004, Glopolis is an independent think-tank.

Mission statement

The work of Glopolis is focused on global development and the response of the Czech Republic and EU to its challenges. We engage with opinion-, decision- and policy-makers to enhance political culture and facilitate transformations towards smart and responsible economy, energy and food systems. Glopolis provides analysis, vision and consultancy, builds networks, and stimulates debates and challenges thinking.

Domains of competences

Glopolis has the following thematic areas and goals:

1) Responsible Economy (Economy and Finance Section)

The Economy and Finance Section aids transformations of economic systems towards responsible production and consumption as well as distribution of human well-being as effective and equitable as possible and within natural limits. To this end, it aims at redefining concepts of development and economic growth, including better management of global resource base, at smart financial regulation and innovative taxation.

2) Energy Responsibility (Climate and Energy Section)

The Climate and Energy Section of Glopolis aims to support responsible development and transformation of production, distribution and consumption of energy, as well as essential climate change adaptation through active engagement in international climate negotiation, stirring debate about Czech climate and energy policy and supporting sustainable energy development in the poor countries.

3) Food Responsibility (Food Security Section)

The Food Security Section strives to support responsible development and transformation of food systems through analysis of the conditions for sustainable productive capacities and functioning markets, esp. in the poor countries, through comprehensive approach and active involvement in policymaking and support for positive food practices in the Czech Republic.

4) Sustainable Czechia (Programme)

The Sustainable Czechia Programme is based on project Česko hledá budoucnost, which aims to formulate an alternative, challenging, but realistic vision for the Czech Republic in the next 15 years in a broad alliance of epistemic community, business and civil society. This shall be a vision enhancing quality of life, modernizing the economy, caring for the environment and strengthening democratic culture.

Internal governance (institutional structure, decision process, internal mobility, etc.)

The growing pool of employees (23) has been able to collectively – on an ongoing basis – reflect administrative and management challenges, adjust, design and implement new organisational processes. These include stricter and more transparent accounting and financial management, effective filing of project application (including lead of large EU projects), high-quality project management, reporting and budget monitoring, planning, coordination and evaluation at different levels (strategic, sectional, project and personal), more elaborated recruitment and human resources policies and more systematic communication and media outreach. Despite several ongoing challenges, this organisational culture (people-oriented, open, collaborative, responsible and learning spirit), management skills, team cohesion and flexibility are a great asset for the future. Reliable organisational background and effective processes allow for deeper reflection of Glopolis mission and actual goals, for transformation of the substance of Glopolis work. That is what this strategic document focuses on.

Please list the projects managed by your organisation in the last three years which demonstrate your organisation's technical, operational and financial capacity to manage the type of grants mentioned in the guidelines for applicants.

1) Title: Eat responsibly! An action-oriented global learning program for EYD 2015 and beyond

Role of Glopolis: leader

Partners: Bulgaria, Croatia, Czech Republic, Latvia, Malta, Poland, Romania, Slovakia and Slovenia.

Period: 1 Feb 2015 until 31 Jan 2018

Objectives: Overall objective are to contribute to the mobilisation of youth to better understand the interdependent world they live in, to be motivated and skilled to take action in favour of globally responsible ways of eating in the New Member States (NMS), through an action-oriented global education program in schools and outreach.

Specific objectives are to better anchor development issues into the work of NMS educational NGOs; to help NMS teachers to integrate these issues into teaching curricula; to develop the critical thinking of pupils and students and empower them to take action and to raise the awareness of their parents and the broader community.

2) Title: Time for change: Promoting sustainable consumption and production of raw materials in the context of EYD

Role of Glopolis: to coordinate one of two research activities that will involve energy dependence of the countries of Central and Eastern Europe on fossil fuels in order to identify opportunities to reduce energy imports in the CEE region.

Leader: CEEweb for Biodiversity (Hungary)

Partners: Cyprus, Czech Republic, Denmark, France, Germany, Hungary, Italy, Poland, Slovakia, Sweden, United Kingdom

Period: 1 Jan 2015 until 31 Dec 2017

Objectives: Overall objectives are: i) NSAs & their networks contributing to the objectives of the EYD 2015 with special attention to citizens in NMS by promoting a sustainable and globally just production and consumption of raw materials; and ii) Contributing to European citizens' understanding of the interdependencies between consumption and production in North-South relations, promoting changed attitudes and consumption practices and active participation in pan-European debates on sustainable development. Specific objective is to promote a pan-European debate about sustainable development by highlighting social and environmental impacts of production and consumption of raw materials in the particular strategic context of EYD 2015.

3) Title: Mobilising European citizens to place inequality and tax justice at the heart of the European development agenda during EYD 2015 and beyond (Tax Justice)

Role of Glopolis: Member of the core implementing team (together with AA UK and Oxfam UK): responsible for smooth implementation of activities under Result 2 – capacity building, 1 global staff responsible for assisting (CEE) partners with implementation of their activities.

Leader: Action Aid UK

Partners: Project in 16 EU countries and 5 associates from non-EU countries + Slovakia: EU MS: Belgium, Bulgaria, Czech Republic, Denmark, France, Germany, Hungary, Ireland, Italy, Latvia, Poland, the Netherlands, Sweden, Slovenia, Spain, UK. Southern countries: Nigeria, Peru, Zambia. Countries reached only through associates: India, Mexico, and Slovakia.

Period: 1 April 2015 – 31 March 2017

Objectives: Overall objective: The EU and its MS lead on promoting fair and equitable tax reform as a driver for inclusive and sustainable growth, reducing poverty and inequality, and promoting fairer relations between developed and developing countries, in the context of the post-MDG consensus.

Specific objectives: Increased EU citizens' critical understanding and active engagement, alongside campaigners in the global South, in pan-European efforts towards progressive and equitable reform of global tax policies, particularly during EYD2015.

4) Title: Financing development and developing finance for EYD2015: a Pan-European campaign to align European investments in developing countries with the post-2015 MDG framework and the EU policies that promote sustainable growth and poverty

Role of Glopolis: Co-Applicant: mainly research and advocacy in the field of development finance (private finance and taxation).

(1) national reports from selected EU13 countries analysing support of private sector in developing countries with focus on ECAs and private sector instruments through ODA. (2) regional report with policy recommendations. Second area of research is focused on taxation. One (3) report should be focusing on double tax treaties in selected EU13 countries, second report (4) should map performance

of companies originated from EU13 in developing countries (including Central Asia) regarding possible tax dodging activities. In connection to report (5) 2-3 short policy BPs will be produced. In connection to regional report (6) one regional capacity building seminar should be organized in Prague.

Leader: CEE Bankwatch Network

Partners: Project in 18 countries (19 partners) : Czech Republic, Poland, Hungary, Bulgaria, Slovenia, Romania, Estonia, Latvia, Croatia, Lithuania, Slovakia, France, United Kingdom, Netherlands, Germany, Belgium, Italy, Spain.

Period: 1 Jan 2015 until 31 Dec 2017

Objectives: Overall objective: Engaging EU citizens and initiating dialogue with policy-makers to ensure the coherence of European public and private investments in developing countries with the post-2015 MDGs framework and European policies for poverty eradication, equitable and sustainable development, climate adaptation and respect for human rights.

Specific objectives: To raise awareness among the public, media and policy-makers about the role and impacts of European public and private investments on poverty reduction in developing countries, by using the EYD2015 to highlight the interlinkages among the EU and developing countries; To advance changes in policies and behaviours at the structural/institutional level promoting poverty eradication and sustainable ways of living and to advocate for development of financial architecture that fully reflects the EU’s development cooperation policies and the post-2015 MDGs framework, particularly with respect to the policies and investments of EU public agencies like the multilateral development banks, export credit agencies as well as the private sector vis a vis tax justice for development; To build capacities and create synergies among EU civil society and active citizens, in particular in the EU13, to effectively engage in a structured dialogue on development finance issues on national as well as EU and global levels.

Affiliated entity no. 8	OXFAM-IBIS
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Establishment and legal status

OXFAM-IBIS originates from a world-wide and university-based organisation, World University Service (WUS) founded in the early 1920s and involved in social activities for students in Europe. In the 1960s, the scope of work was expanded to the third world, initially in the form of support to the liberation movements in Southern Africa.

In 1970, the Danish WUS was established as an independent organisation and in 1991 the name was changed to OXFAM-IBIS. During this period the organisation started to support the peoples of Central America who were rebelling against decades of dictatorship.

Currently, OXFAM-IBIS works in cooperation with civil society partners as well as with national and local authorities and governments in Latin America and Africa. The daily management of the organisation is taken care of by OXFAM-IBIS head office in Denmark and country offices in Guatemala, Nicaragua, Liberia, Sierra Leone, Ghana, Burkina Faso, South Sudan and Mozambique. In addition, OXFAM-IBIS carries out extensive policy and campaign work in Denmark and Europe.

Mission statement

Vision: OXFAM-IBIS works for a just world with equal access to education, influence and resources. With partners, OXFAM-IBIS combats global inequality and poverty.

Mission

Locally: We strengthen individual rights and opportunities to take part in society

Nationally: We support democratic development that promotes collective rights and popular participation in policy decisions.

Globally: We defend poor people’s interests and find solutions to structural problems of global economic inequality and poverty.

Domains of competences

The work of OXFAM-IBIS is guided by three global strategies: “Democratic Governance, Citizens’ Rights and Economic Justice”, “Education for Change” and “Global Partnership Strategy”. While the governance and education strategies set the strategic framework for OXFAM-IBIS’ work globally, the partnership strategy transcends all the work. Having made a conscious move away from service delivery, the organisation provides capacity building, support and mentoring to CSOs in the Global South, mostly in the fields of influencing and evidence-based advocacy. Through vertical links, connecting locally collected evidence with national and global level policy and campaigning, OXFAM-IBIS seeks to fulfill its vision and mission.

Over the last 20 years, OXFAM-IBIS has been the leading Danish development organisation on finance for development issues focusing on debt cancellation, aid, domestic resource mobilisation and fair tax, remittances and other financial flows. OXFAM-IBIS holds a strong line of work on engaging in dialogue on corporate accountability and responsibility of the private sector, not least the financial sector.

Internal governance (institutional structure, decision process, internal mobility, etc.)

OXFAM-IBIS is a membership organisation. Final overall management decisions are made at the General Assembly. The Board is a democratically elected body of 14 members, elected by ballot at the General Assembly. Currently six members of the Board are female and eight male; the chair person is female. Main responsibilities of the Board are OXFAM-IBIS’ overall strategy, policy and financial affairs.

The Management Group consists of the eight Country Directors (4 F, 4 M), Head Office Directors (2 F, 2M) in OXFAM-IBIS and the General Secretary (M), who chairs the group. The overall objective of the Management Group is to ensure strong management and strategic leadership in OXFAM-IBIS within the political mandate decided by the Board of OXFAM-IBIS.

Within OXFAM-IBIS staff can move from North to South and South to North. Members of staff across the continents are connected in Global Groups (e.g. Global Governance and Education Groups, group of Heads of Finance and Admin, etc.) for shared learning, strategizing and coordination.

Please list the projects managed by your organisation in the last three years which demonstrate your organisation’s technical, operational and financial capacity to manage the type of grants mentioned in the guidelines for applicants.

OXFAM-IBIS has extensive experience with quality programme and project management. The organisation has been a strategic partner of Danida for more than 20 years and is one of the frame grant organisations in Denmark.

In order to qualify for this position, OXFAM-IBIS’ technical, operation and financial capacity (e.g. monitoring & evaluation systems, financial systems and programmatic expertise) is regularly assessed by Danida. The last review (2013) praised OXFAM-IBIS’ M&E systems.

In addition to the frame grant, OXFAM-IBIS has substantial income from other institutional donors (in 2014 38% of total income). The organisation has the necessary administrative and technical capacity to manage a variety of donors’ requirements and the programmatic and technical expertise to deliver results under these grants. The following are examples of such grants:

- In Mozambique, OXFAM-IBIS implements the programme “Access 2 Information and Citizens’ Engagement” with financial support of SIDA (€21,278,661). It is the second phase of the programme.
- In close collaboration with the Africa Network Campaign for Education for All (ANCEFA), OXFAM-IBIS implements the programme “Enhanced Structured Dialogue between Civil Society Organisations and Policy Makers on the Right to Education for All in Africa” with regional activities and six target countries. The programme is financed by the European Union, contract no DCI-NSAPVD/2013/286-849 (€1,013,862).

Affiliated entity no. 9	IGO (Instytut Globalnej Odpowiedzialnosc – IGO)
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Establishment and legal status

Institute of Global Responsibility (IGO) is an independent non-governmental organisation (NGO, foundation) based in Warsaw, Poland. It was established in 2007 and since that time has been focusing on development policy issues, development education and cooperation with partners in the South.

Mission statement and domains of competences

Central to IGO's mission is to take position on the challenging areas of North-South relations and concentrate on Poland's global responsibilities towards developing countries when it comes to trade, finance, economic regulations and the social dimension of globalisation. Therefore, IGO is engaged in public debates at Polish and European levels.

(a) We support concrete initiatives of Southern partners that mitigate the causes of injustice and improve the mechanisms of development cooperation.

(b) We strive to influence Polish (and European) development cooperation to make it truly based on Southern priorities.

(c) We raise awareness among Polish society about responsibilities and interdependencies, in spirit of equality and participation.

All activities of IGO are based on this mission statement and our approach to specific issues is aligned to it as well.

Internal governance (institutional structure, decision process, internal mobility, etc.)

Currently, IGO has 14 long-term staff members and dozens of activists and multipliers. IGO is one of leading Polish NGO in development policy. IGO representative is a member of the board of Polish NGDO platform Grupa Zagranica (60 member organisations) and a member of the Development Cooperation Programme Board, a consultative body to the Minister of Foreign Affairs of Poland. IGO works with schools (all levels), activists, NGOs, universities, think-tanks, media, members of Parliament and European Parliament and with ministries and other public authorities.

Please list the projects managed by your organisation in the last three years which demonstrate your organisation's technical, operational and financial capacity to manage the type of grants mentioned in the guidelines for applicants.

IGO was a lead organisation in following projects:

- 1) Let's talk about majority of the world – Norway Grants operated by Batory Foundation in Poland
- 2) Small farmers are the hope for eradication of hunger operated – Ministry of Foreign Affairs
- 3) Student leaders active in Polish public debate – world's resources and global processes – Swiss Grant operated by ECORYS in Poland
- 4) Preparation of four strategic documents on Polish development cooperation by Batory Foundation.

IGO is/was a partner organisation in the following projects (titles): EuropeAid Non-State Actors and Local Authorities in Development: Raising public awareness of development issues and promoting development education in the European Union:

- 1) Mobilising European citizens to place inequality and tax justice at the heart of the European development agenda during EYD2015 and beyond.
- 2) Time for change: Promoting sustainable consumption and production of raw materials in the context of EYD 2015 and beyond!
- 3) EYD2015: Spotlight on the global food-land-climate nexus – mobilizing European support for sustainable management of natural resources and the human right to food.
- 4) TABLE FOR NINE BILLIONS: promoting Europe's role in growing food and climate justice worldwide.
- 5) Addressing illicit capital flight for policy coherence for development.
- 6) Teachers: agents of change. A strategic approach to anchoring development education in Czech and in Polish formal education systems.
- 7) Konsum und Verantwortung: Jugendliche lernen spielend die Welt zu verändern.

Establishment and legal status

The Observatory on Debt in Globalisation (ODG) is a non-profit organisation under the legal form of a cooperative. The ODG was born in the context of the initiative by Citizen Network for the Abolition of Foreign Debt (RCADE) in the spring of 2000. In this period RCADE organised a campaign for a Social Consultation for the Abolition of Foreign Debt. ODG's mission has followed the principle that impregnated that initiative.

Mission statement

Along the years ODG has addresses the unjust relations that, among other things, generate debts between nations and communities during the current globalisation process. This matter is treated from a variety of dimensions that belong within the Education for Development. In the last 15 years, ODG has earned a reputation in Catalonia and Spain for its research, training programmes, awareness raising and mobilisation campaigns regarding the issue of foreign debt and other neo-colonial and patriarchal relations.

Domains of competences

ODG's team has accumulated significant experience in the development and coordination of activities and preparation of awareness and training materials, as well as in the participation in denunciation and mobilisation activities with the aim of strengthening the Catalan associational and institutional fabric, on the basis of rigorous, but activist-minded, research. In carrying out its task, ODG has made an effort to participate actively in social local, national and international networking. The integration of ODG in different international networks is very present in the design and planning of its work, not only operationally but also economically, since many of its projects have been funded through different European projects.

The experience, expertise and management abilities in the topics of energy and debt allow ODG's participation in different social activist platforms in Spain such as the Platform for Citizen Debt Audits (PACD) and the Energy Sovereignty Network (Xse). In both ODG is a founding member and active participant. Both platforms are active in producing research and organising campaigns that find their results in initiatives such as the Citizen Audit of Madrid, in which members of ODG are active participants.

As for the inclusion of a gender perspective, since its creation ODG has participated in groups that work in favour of gender equality. Since the end of 2000, ODG has also worked in groups that promoted the study and campaigning of eco-feminist perspectives, which we find necessary to include in our day-to-day economic analyses.

In its normal functioning ODG has put to work mechanisms of participation, transparency and accountability that are respectful with the principles of human rights, gender equality and participation of women. ODG is a horizontal organization that reaches its decisions through debate and assembly consensus processes. ODG has applied a female-male parity criteria for the formation of its direction board of the organization. It has also applied its humanist and feminist political beliefs to the labour rights of the workers of the organization, paying special attention to offering flexibility in periods of maternity, paternity, care of dependent family members and mourning. Members of ODG work in different areas such as research, which has two areas (debt and energy) and administration (accounting, communications and office maintenance). ODG researchers combine specialized research work with tasks of administration, communication and maintenance. The sharing of tasks tries to respect the balance between the preferences of the members with the need of their implementation.

Internal governance (institutional structure, decision process, internal mobility, etc.)

ODG is a horizontal organisation that reaches its important decisions through debate and assembly consensus processes, which take place twice a month. Technical decisions, are decided in the technical team and prepared by the responsible of each area (communication, finance, content, human resource). As for internal mobility, members of ODG work in different areas such as research, which has two areas (debt and energy) and administration (accounting, communications and office maintenance).

Please list the projects managed by your organisation in the last three years which demonstrate your organisation’s technical, operational and financial capacity to manage the type of grants mentioned in the guidelines for applicants.

1) Project title: Finical Justice: Perspectives and alternatives for a more responsible, and democratic financial system

Cost of the action (EUR): €263,519.93
 Donor: Ajuntament de Barcelona and Agència Catalana de Cooperació al Desenvolupament
 Dates: 2010 – 2015
 Type of activities: Research, education, awareness raising, advocacy

2) Project title: Ecawatch, Environmental Justice and Critical Mapping

Cost of the action (EUR): €47,118.88
 Donor: FERN – Sticing Foundation and EURONATURA – Mott Foundation
 Dates: 2008 – 2013
 Type of activities: awareness raising, advocacy

3) Project title: Interferències: Elaboration of educational multimedia material on debt issues concerning the global North and South

Cost of the action (EUR): €71,155.05
 Donor: Ajuntament de Sant Cugat, Diputació de Barcelona, Ajuntament de Sabadell, Fons Menorqui de Cooperació
 Dates: 2010 – 2012
 Type of activities: research, education, awareness raising, advocacy

4) Project title: Towards policy coherence for development as a requisite for the effectiveness of international aid

Cost of the action (EUR): €60,000.00
 Donor: Agència Catalana de Cooperació al Desenvolupament
 Dates: 2011 – 2014
 Type of activities: research, awareness raising, advocacy

5) Project title: Democratising energy for development: mobilising public support for fair energy relations and democratising the process regarding the EU Common External Energy Policy to develop a coherent, just and sustainable European policy

Cost of the action (EUR): €73,839.00
 Donor: EC
 Dates: 2013 – 2015
 Type of activities: research, education, awareness raising, advocacy

6) Project title: Prompting change in European attitudes toward the IMF’s development role and developing country debt management to help achieve the MDGs

Cost of the action (EUR): €118,083.00
 Donor: EC
 Dates: 2013 – 2015
 Type of activities: research, education, awareness raising, advocacy

7) Project title: Development finance for equitable growth: enhancing dialogue between EU civil society and decision-makers

Cost of the action (EUR): €138,377.00
 Donor: EC
 Dates: 2015 – 2017
 Type of activities: research, awareness raising, advocacy

Affiliated entity no. 11	Re:Common
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Establishment and legal status

Re:Common was established in 2012 as result of the strategic review of CRBM, the advocacy programme of the Italian NGO Mani Tese. Re:Common is a not-for-profit association for social promotion registered in the Lazio region of Italy (registration number 4232/3).

Mission statement and domains of competences

Re:Common is a public campaign membership based organisation challenging the financialisation of the natural commons in solidarity with affected communities both in the South and in the North and advocating for new and democratic public financial institutions at national and global level to promote the commons.

Internal governance (institutional structure, decision process, internal mobility, etc.)

Re:Common has a board appointed by the assembly of its members. Re:Common's management and staff is in charge of implementing Re:Common workplan as agreed by the assembly each year. Currently Re:Common has seven full staff-time.

Please list the projects managed by your organisation in the last three years which demonstrate your organisation's technical, operational and financial capacity to manage the type of grants mentioned in the guidelines for applicants.

1) Project title: Raising public awareness of development issues and promoting development education in the European Union

Cost of the action (EUR): €141,371.00

Donor: EC

Leader: Nhuti Duha

Role of Re:Common: Co-applicant

2) Project title: Grabbing development. Towards new models of North/South relations for fair exploitation of natural resources

Cost of the action (EUR): €45,337.00

Donor: EC

Leader: Mani Tese

Role of Re:Common: Co-applicant

3) Project title: Development finance for equitable growth: enhancing dialogue between EU civil society and decision-makers

Cost of the action (EUR): €30,700.00

Donor: EC

Leader: Eurodad

Role of Re:Common: Co-applicant

4) Project title: Bringing new citizens' voice to EU decision-makers by raising debates on energy security and resource efficiency and building public opinion on the revisions of relevant policies of the EU banks

Cost of the action (EUR): €50,048.00

Donor: EC

Leader: Counter Balance

Role of Re:Common: Co-applicant

5) Project title: Democratising energy for development: mobilising public support for fair energy relations and democratising the process regarding the EU Common External Energy Policy to develop a coherent, just and sustainable European policy

Cost of the action (EUR): €122,570.00

Donor: EC

Leader: CEE Bankwatch Network

Role of Re:Common: Co-applicant

6) Project title: Addressing illicit capital flight for policy coherence for development

Cost of the action (EUR): €58,400.00

Donor: EC

Leader: Eurodad

Role of Re:Common: Co-applicant

7) Project title: Making EU Investment Policy Work for Sustainable Development

Cost of the action (EUR): €85.303.00

Donor: EC

Leader: Transnational Institute

Role of Re:Common: Co-applicant

8) Project title: Financing sustainable futures

Cost of the action (EUR): €85,600.00

Donor: EC

Leader: Friends of the Earth International

Role of Re:Common: Co-applicant

9) Project title: Financing development and developing finance for EYD2015: a Pan-European campaign to align European investments in developing countries with the post-2015MDG framework and the EU policies that promote sustainable growth and poverty reduction

Cost of the action (EUR): €195,724.00

Donor: EC

Leader: CEE Bankwatch Network

Role of Re:Common: Co-applicant

10) Project title: Time for change: promoting sustainable consumption and production of raw materials in the context of EYD2015 and beyond!

Cost of the action (EUR): €134,254.00

Donor: EC

Leader: CEE Web

Role of Re:Common: Co-applicant

Affiliated entity no. 12	SOMO (Stichting Onderzoek Multinationale Ondernemingen)
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Establishment and legal status

The Centre for Research on Multinational Corporations (SOMO) is an independent, not-for-profit research and network organisation working on social, ecological and economic issues related to sustainable development. Since 1973, the organisation investigates multinational corporations and the consequences of their activities for people and the environment around the world.

Year of establishment: SOMO was established in 1973 in the Netherlands.

Size: 2014 budget: €3,780,000; 2014 realization: €3,553,356. (Source: SOMO Annual Report 2014, pg. 65)

Number of employees: At the end of 2014, SOMO employed 38 people (12 male, 26 female) at 28.5 FTE.

Legal Status: SOMO is a Dutch foundation registered in Amsterdam, The Netherlands. The foundation is a civil society organisation and has non-profit status.

Membership in Fundraising Registry: SOMO is a member of Partos, the Dutch association of NGOs working in International Development. In 2014, SOMO continued its official status as a registered charity, the so-called ANBI status (Algemeen Nut Beogende Instellingen). As a consequence, financial gifts to SOMO are deductible from taxable income.

Mission statement

SOMO strives toward global economic development that is sustainable and fair and toward the elimination of the structural causes of poverty, environmental problems, exploitation and inequality. Through research targeted at achieving sustainable change and strengthening cooperation, SOMO seeks to offer social organisations worldwide, especially those in developing countries, the opportunity to promote sustainable alternatives and to provide a counterweight to unsustainable strategies and practices of multinational corporations.

Vision

In SOMO's vision, strong civil society organisations are the initiators and drivers of positive change. Such change is initiated on the basis of reliable information and close cooperation and is guided by the principles of social and economic justice, sustainable development, transparency and fair distribution of power. In order to realise its mission, SOMO aims to strengthen the position of civil society organisations, workers and local communities. SOMO achieves this by integrating knowledge and action with regard to multinational corporations.

Domains of competences

Through research targeted at achieving sustainable change and strengthening cooperation, SOMO seeks to offer social organisations worldwide, especially those in developing countries, the opportunity to promote sustainable alternatives and to provide a counterweight to unsustainable strategies and practices of multinational corporations.

SOMO has expertise in:

- Sectors and value chains: Energy and water, electronics, food and agriculture, extractives, garment, financial and the pharmaceutical sector.
- Corporate research: Generating tailor-made corporate profiles, investigating business-related controversies and monitoring corporate impacts.
- Corporate accountability: Corporate social responsibility (CSR), regulation, international guidelines and standards, voluntary initiatives and codes of conduct.
- Economic reform: Tax justice, trade and investment, policy coherence and alternative socio-economic models.

Internal governance (institutional structure, decision process, internal mobility, etc.)

As a foundation, SOMO is governed by a board composed of a chairperson and two board members. The stated responsibility of the board is to supervise the organisation. The managing director is the only member of the board of directors. Together with three programme managers, the managing director forms the (daily) management team of SOMO. The organisation's staff remains the most important decision-making organ regarding strategy and annual plans. The steering committees of the networks and coalitions hosted by SOMO are responsible for the strategy and plans of the networks. The members of the networks are represented in a steering committee. The management and board of SOMO are responsible for the organisational and managerial context (Source: Annual Report 2014, pg. 58).

Please list the projects managed by your organisation in the last three years which demonstrate your organisation's technical, operational and financial capacity to manage the type of grants mentioned in the guidelines for applicants.

1) Project title: GoodElectronics Network: Information, Capacity Building and Engagement with the Electronics Industry, for sustainability and human rights

Cost of the action (EUR): €2,064,283

Donor: EC

Leader: SOMO

Partners: Europe: BE, DK, FR, FI, GE, HU, SW, NL, PO, SP, CH, UK; Asia: CN, IN, PH, TH, VN, ID, KR, MY, TW; The Americas: USA, CA, BR, MX; Africa: DRC, GH, ZA

Period: 01/01/2013 – 31/12/2018 (ongoing)

Objective: to contribute to an electronics industry characterised by compliance with the highest international human rights and sustainability standards, where labour rights and environmental norms are respected throughout the entire production cycle, from the mining of minerals used in electronics products, to the manufacturing phase, and the recycling and disposal of electronics waste, both on the level of companies' own operations and in the supply chain.

2) Project title: MakeITfair: awareness raising towards change in the electronics industry

Cost of the action (EUR): €1,325,323

Donor: EC

Leader: SOMO

Partners: Europe: NL, DE, SW, FR, PO, HU, CZ, Asia: CH, IN, ID, PH, VN, MY Africa: DRC, GH, SA

Period: 19/01/2010- 18/01/2013

Objective: to raise awareness among the selects target groups of electronics companies and consumers about human rights violations, workers' rights and the environmental impacts of the supply chain of certain portable electronic items as well as solutions and through doing this to push companies to adopt a change in their practices that contribute to the respect of human and workers' rights and sound environmental practices.

3) Project title: European Supermarkets: Mobilising Support for Pro-Development Supply Chains

Cost of the action (EUR): €1,331,990

Donor: EC

Leader: SOMO

Partners: Europe: Belgium, Denmark, France, Germany, Greece, Hungary, the Netherlands, Poland, Spain, UK

Period: 01/07/2011 – 01/07/2014

Objective: to contribute to improved livelihoods for developing workers and farmers by promoting fair commercial relations and decent work within EU supermarket agricultural product supply chains.

4) Project title: Boost for sustainable European supermarket store-brands as a key driver for the EYD 2015 and beyond

Cost of the action (EUR): €5,163,890

Donor: EC

Leader: SOMO

Partners: Europe: all countries

Period: 01/01/2015-31/12/2017 (ongoing)

Objective: to improve the sustainability of production and consumption patterns of supermarket store-brands in the context of the European Year of Development (EYD) 2015 and beyond. This will be done by supporting and promoting all the objectives of the EYD 2015; by facilitating and contributing to pan-European debates on sustainable development in the post-MDG framework; and by enhancing the understanding of European citizens of the interdependencies between sustainable consumption and production patterns in Europe and global sustainable development.

Affiliated entity no. 13	WEED (Weltwirtschaft, Ökologie & Entwicklung – WEED e.V.)
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Establishment and legal status

WEED is a registered organisation (listed in the German association register) with charity status by the German tax authority (“Gemeinnützigkeit”). It was founded in 1990 to boost analyses as well as lobby and advocacy activities on this issue in Germany and beyond.

Mission statement

WEED is an organisation that works on the impact of globalisation on people and the environment. WEED campaigns for a broad correction in international economic and development policies that would put social justice and economic sustainability in the centre of international policy-making. WEED is strongly involved in many policy networks in Germany, the EU (Eurodad, Finance Watch) and at global level, particularly on the financial transaction tax, commodity speculation, tax evasion/avoidance, corporate accountability and sustainable procurement.

Domains of competences

The current main fields of work are:

1. Sustainable production and public procurement
2. Trade and investment policy
3. Financial markets and taxes.

Internal governance (institutional structure, decision process, internal mobility, etc.)

It currently has five staff members in the Berlin office and a board of (volunteer) directors. Formally, the chairman and the treasurer can each represent WEED in legal affairs. However, most of the

ongoing work and decisions are delegated to the office staff. Important decisions are taken jointly by the staff and the board of directors.

WEED receives funding from member fees, donations, private foundations and public entities (EU, Germany, Berlin).

Please list the projects managed by your organisation in the last three years which demonstrate your organisation's technical, operational and financial capacity to manage the type of grants mentioned in the guidelines for applicants.

WEED has extensive experience in project management and implementation, particularly EU projects (EuropeAid), both as partner and as lead. This includes:

- 1) EuropeAid for years, currently on sustainable procurement (DCI-NSAED/2012/280-688), before 2011-2014 on the same issue (DCI-NSAED/2010/234-364), 2010-2012 on financial markets (DCI-NSA ED/2009/202-375), 2010-2012 on trade (DCI/NSAED/2009/201-975).
- 2) Ministry of development for years, currently on sustainable production of mobile phones.
- 3) Ford Foundation on financial markets from 2007 – 2015.
- 4) Bread for the World (protestant development agency) since 2014 on financial markets.
- 5) Stiftung Umwelt & Entwicklung Nordrhein-Westfalen since 2013 on sustainable procurement.
- 6) City of Berlin since at least 2010 on public procurement and labelling of sustainable products.

5.3 Affiliated entity(ies)'s Statement

All affiliated entity(ies)'s Statements signed are attached to this application (see Annex1)

6. ASSOCIATES OF THE APPLICANT PARTICIPATING IN THE ACTION

This section must be completed for each associated organisation within the meaning of Section 2.1.3 of the Guidelines for Applicants. You must make as many copies of this table as necessary to create entries for more associates.

	Associate no. 1
Full legal name	11.11.11 – Koepel van de Vlaamse Noord Zuid beweging
EuropeAid ID number⁹⁴	BE-2007-DPH-2711236772
Country of Registration	Belgium
Legal status⁹⁵	Non-profit (vereniging zonder winstoogmerk)
Official address	Vlasfabriekstraat 11, 1060 Brussels
Contact person	Jan Van de Poel
Tel: country code + city code + number	+32 2 536 11 74
Fax: country code + city code + number	+32 2 536 19 82
E-mail address	Jan.VandePoel@11.be

⁹⁴ This number is available to an organisation which registers its data in PADOR. For more information and to register, please visit http://ec.europa.eu/europeaid/pador_en

⁹⁵ E.g. non-profit, governmental body or international organisation.

Number of employees	95
Experience of similar actions, in relation to role in implementing the proposed action	11.11.11 is actively engaged in work on aid, debt and tax.
History of cooperation with the applicants	Eurodad member since 2000. 11.11.11 is a founding member of the Eurodad network and active member ever since. 11.11.11 representative served on the board.
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 2
Full legal name	Alliance Sud
EuropeAid ID number	N/A
Country of Registration	Switzerland
Legal status	Non-profit organisation
Official address	Monbijoustrasse 31, PO Box 6735, CH-3001 Berne
Contact person	Marc Herkenrath (Director)
Tel: country code + city code + number	++41 31 390 93 30
Fax: country code + city code + number	++41 31 390 93 31
E-mail address	Mark.herkenrath@alliancesud.ch
Number of employees	21
Experience of similar actions, in relation to role in implementing the proposed action	Has been an active member of Eurodad since joining, and has participated in many collaborative actions as part of the network.
History of cooperation with the applicants	Eurodad member since 2005
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy

	Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).
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	Associate no. 3
Full legal name	Public Eye
EuropeAid ID number	N/A
Country of Registration	Switzerland
Legal status	Association
Official address	Dickens 4, 1006 Lausanne
Contact person	Olivier Longchamp
Tel: country code + city code + number	++41/21.600.22.14
Fax: country code + city code + number	N/A
E-mail address	longchamp@ladb.ch
Number of employees	35
Experience of similar actions, in relation to role in implementing the proposed action	Working on the topic of illicit financial flows since the early 1970's
History of cooperation with the applicants	Eurodad member since 2007
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 4
Full legal name	CCFD – Terre Solidaire
EuropeAid ID number	FA-2007-DON-2711212874
Country of Registration	France
Legal status	Non-profit
Official address	4 rue Jean Lantier 75001 Paris
Contact person	Lucie Watrinet
Tel: country code + city code + number	+33(0)1 44 82 81 28
Fax: country code + city code + number	+ 33 (0)1 44 82 81 42
E-mail address	l.watrinet@ccfd-terresolidaire.org
Number of employees	Up to September 2015 : 163

Experience of similar actions, in relation to role in implementing the proposed action	Has been an active member of Eurodad since joining, and has participated in many collaborative actions as part of the network.
History of cooperation with the applicants	Eurodad member since 2001
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 5
Full legal name	Cercle de Coopération des Organisations Non Gouvernementales du Développement
EuropeAid ID number	LU-2007-DOM-271209758
Country of Registration	Luxembourg
Legal status	Non profit
Official address	13 Avenue Gaston Diderich L-1420 Luxembourg
Contact person	Christine Dahm – Director
Tel: country code + city code + number	+352 26 02 09 11
Fax: country code + city code + number	+352 26 02 09 26
E-mail address	Christine.dahm@cercle.lu
Number of employees	9 (as on 27.10.2015)
Experience of similar actions, in relation to role in implementing the proposed action	Organisation of 2 thematic days on Tax Justice (round table discussion and workshop, press conference) held in Luxembourg on 2-3 June 2015 in the framework of a EU funded awareness project (DCI-NSAED-2015/356-029)
History of cooperation with the applicants	Eurodad member since 2012. The Cercle has been member of Eurodad for some years. The Cercle collaborated with Eurodad on the organisation of the thematic days on tax justice in June 2015 in Luxembourg.
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this

	Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 6
Full legal name	Christian Aid
EuropeAid ID number	GB-2007-DOG-2711191461
Country of Registration	UK
Legal status	Non-profit
Official address	35-41 Lower Marsh, London, SE1 7RL, UK
Contact person	Toby Quantrill
Tel: country code + city code + number	+44 20 7620 4444
Fax: country code + city code + number	+44 20 7620 0719
E-mail address	TQuantrill@christian-aid.org
Number of employees	968 paid staff, equivalent to 921.77 FTE
Experience of similar actions, in relation to role in implementing the proposed action	Christian Aid has worked very closely with Eurodad, and with many other civil society organisations across Europe, to raise public awareness of Economic Justice issues, especially with regard to the impact of European policy on developing countries. We also work with other civil society organisations to develop, and advocate for, specific policy proposals that we believe would ensure that developing countries, and poor people in those countries, are able to benefit from their relations with the EU.
History of cooperation with the applicants	Eurodad member since 1999. Christian Aid has been an active member of the Eurodad network for more than 20 years, working and campaigning together on debt, global institutional reform and tax amongst other economic justice issues. We currently chair the Eurodad Board and regularly cooperate to run workshops at Eurodad global conferences. We work closely with Eurodad as part of the 'Tax Justice Europe' network (the European platform of the Global Alliance for Tax Justice) and the financial Transparency Coalition. We have also worked with Eurodad as active

	partners in the EC Capital Flight project. Christian Aid brings a combination of policy and faith based analysis to debates, and can connect Eurodad and its other partners with a global network of faith organisations.
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 7
Full legal name	Church of Sweden
EuropeAid ID number	SE-2009-ARZ-210899730
Country of Registration	Sweden
Legal status	Registrerat Trossamfund
Official address	Sysslomansgatan 4, 753 10 Uppsala, Sweden
Contact person	Christian Lagerlöf
Tel: country code + city code + number	0046 – (0) 18 169500
Fax: country code + city code + number	N/A
E-mail address	Kyrkokansliet.IntAvd@svenskakyrkan.se
Number of employees	300
Experience of similar actions, in relation to role in implementing the proposed action	N/A
History of cooperation with the applicants	Eurodad member since 1990
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 8
Full legal name	Centre National de Coopération au Développement – Communauté Française et Germanophone. CNCD-11.11.11
EuropeAid ID number	BE-2007-DOL-2711205313
Country of Registration	Belgium
Legal status	ASBL
Official address	9 Quai du commerce, 1000 Brussels
Contact person	Antonio Gambini
Tel: country code + city code + number	+32 (0) 2 250 12 30
Fax: country code + city code + number	+32 (0) 2 250 12 63
E-mail address	cncd@cncd.be
Number of employees	47,2 full-time staff on 31/12/2014
Experience of similar actions, in relation to role in implementing the proposed action	Has been an active member of Eurodad since joining, and has participated in many collaborative actions as part of the network. Elected to the Eurodad board.
History of cooperation with the applicants	Eurodad member since 1999
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 9
Full legal name	Diakonia
EuropeAid ID number	SE-2007-DQA-2711276147
Country of Registration	Sweden
Legal status	Non-profit making organisation
Official address	P.O. Box 14038, 167 14 Bromma, Sweden Visiting address; Gustavslundsvagen 18, Alviks Torg, Bromma
Contact person	Penny Davies
Tel: country code + city code + number	+46 8 453 6900

Fax: country code + city code + number	+46 8 453 6929
E-mail address	Penny.davies@diakonia.se
Number of employees	Globally: around 290 employees In Sweden: around 45 employees
Experience of similar actions, in relation to role in implementing the proposed action	Diakonia has over a decade long history of working on development finance issues together with Eurodad and its members. In Sweden we conduct advocacy targeting decision-makers, mobilisation targeting local congregations and youth activists and media and communication work targeting journalists and opinion-makers.
History of cooperation with the applicants	Eurodad member since 2001
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 10
Full legal name	Ekumenická akademie, z.s.
EuropeAid ID number	CZ-2008-BCH-1107489032
Country of Registration	Czech Republic
Legal status	Non-profit
Official address	Sokolovska 50, 186 00 Praha 8, Czech Republic
Contact person	Jiri Silny
Tel: country code + city code + number	00420 272737770
Fax: country code + city code + number	N/A
E-mail address	Jiri.silny@ekumakad.cz
Number of employees	14
Experience of similar actions, in relation to role in implementing the proposed action	Ecumenical academy follows the topic of sovereign debt since 1999 in a series of projects and activities addressing public, media, stakeholders and politicians. In the proposed action we welcome to have the possibility to exchange information and experiences and use this in our work.

History of cooperation with the applicants	Eurodad member since 2007
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 11
Full legal name	ForUM – The Norwegian Forum for Environment and Development
EuropeAid ID number	N/A
Country of Registration	Norway
Legal status	Non-profit
Official address	Storgata 11, N-0155 Oslo, Norway
Contact person	Andrew Preston, Director
Tel: country code + city code + number	+47-23010300
Fax: country code + city code + number	N/A
E-mail address	forumfor@forumfor.no
Number of employees	7
Experience of similar actions, in relation to role in implementing the proposed action	Has been an active member of Eurodad since joining, and has participated in many collaborative actions as part of the network.
History of cooperation with the applicants	Eurodad member since 2011. As a member, ForUM has taken an active part in policy discussions and development, as well as acting on common policies in its own advocacy work in Norway.
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 12
Full legal name	Forum Syd
EuropeAid ID number	SE-2007-DUW-2711466734
Country of Registration	Sweden
Legal status	Non-profit
Official address	Box 15407 (Visiting address Katarinavägen 20) SE-104 65 Stockholm Sweden
Contact person	Emelie Aho
Tel: country code + city code + number	+46 (0)8 506 370 00
Fax: country code + city code + number	N/A
E-mail address	forum.syd@forumsyd.org
Number of employees	97 (2014)
Experience of similar actions, in relation to role in implementing the proposed action	Forum Syd has a long experience implementing actions such as proposed in the proposal. Forum Syd has currently EU funded projects and grants from the Swedish International Development and Aid Agency. Forum Syd is an umbrella organisation itself, gathering more than 160 members from civil society in Sweden.
History of cooperation with the applicants	Eurodad member since 2000. Forum Syd is part of the EU Capital Flight project, coordinated by Eurodad. Forum Syd works closely with more than 15 partners in that particular project but has many partners in the overall work.
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 13
Full legal name	Jubilee Debt Campaign
EuropeAid ID number	GB-2008-CKX-2503062035
Country of Registration	United Kingdom

Legal status	Company limited by guarantee no. 3201959, Registered Charity no. 1055675
Official address	The Grayston Centre 28 Charles Square London N1 6HT UK
Contact person	Sarah-Jayne Clifton
Tel: country code + city code + number	+44 (0) 20 7324 4722
Fax: country code + city code + number	N/A
E-mail address	sarah@jubileedebt.org.uk
Number of employees	6
Experience of similar actions, in relation to role in implementing the proposed action	Jubilee Debt Campaign is the lead partner for project DCI-NSAED/2012/279-825 (“Prompting change in European attitudes towards the IMF’s development role and developing country debt management to help achieve the MDGs”), a three-year project funded by EuropeAid under the Non-state actors and local authorities in development stream of development education funding.
History of cooperation with the applicants	Eurodad member since Jubilee Debt Campaign was founded in 2001. We regularly participate in Eurodad events including debt strategy meetings, annual conferences and the EuroIFI network, and collaborate on research and policy papers, campaigns and advocacy actions.
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 14
Full legal name	Jubilee Scotland
EuropeAid ID number	N/A
Country of Registration	UK
Legal status	Charitable organisation
Official address	41 George IV Bridge

	Edinburgh, EH1 1EL
Contact person	Ashley Erdman
Tel: country code + city code + number	+4401312254321
Fax: country code + city code + number	N/A
E-mail address	ashley@jubileescotland.org.uk
Number of employees	2
Experience of similar actions, in relation to role in implementing the proposed action	Has participated in several collaborative actions as part of the network.
History of cooperation with the applicants	Eurodad member since 2007. It has been actively involved in European debt strategy meetings and coordination actions for debt justice.
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 15
Full legal name	Kepa ry
EuropeAid ID number	FI-2007-DRO-2711334104
Country of Registration	Finland
Legal status	Non-profit organisation
Official address	Elimäenkatu 25-27, 00510 Helsinki
Contact person	Pauliina Saares
Tel: country code + city code + number	+358 50 317 6738
Fax: country code + city code + number	N/A
E-mail address	pauliina.saares@kepa.fi
Number of employees	80
Experience of similar actions, in relation to role in implementing the proposed action	Kepa is a national umbrella organisation for over 300 Finnish NGOs working on issues related to global justice.
History of cooperation with the applicants	Member of Eurodad since 1999
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this Action is designed to support. The

	Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 16
Full legal name	Kindernothilfe e.V., Germany
EuropeAid ID number	DE-2007-DOR-2711230044
Country of Registration	Germany
Legal status	NGO
Official address	Düsseldorfer Landstraße 180 47249 Duisburg Germany
Contact person	Frank Mischo
Tel: country code + city code + number	+49.203.7789.129
Fax: country code + city code + number	+49.203.7789.118
E-mail address	Frank.mischo@knh.de
Number of employees	170
Experience of similar actions, in relation to role in implementing the proposed action	Has been an active member of Eurodad since joining, and has participated in many collaborative actions as part of the network.
History of cooperation with the applicants	Eurodad member since 2000
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 17
Full legal name	Koordinierungsstelle der Österreichischen Bischofskonferenz für internationale Entwicklung und Mission

	- KOO
EuropeAid ID number	N/A
Country of Registration	Austria
Legal status	Austrian Episcopal Conference (non-profit)
Official address	Türkenstrasse 3/3, A- 1090 Vienna Austria
Contact person	Hilde Wipfel
Tel: country code + city code + number	+4313170321
Fax: country code + city code + number	+431317032185
E-mail address	h.wipfel@koo.at
Number of employees	4
Experience of similar actions, in relation to role in implementing the proposed action	<p>KOO has a wide outreach in Austrian Civil society via its 28 member organisations and its roots in the structures of the Catholic church. KOO has experience in awareness raising, networking and joint actions at national level as well as European and global level through its membership in EURODAD and CIDSE. It is a well-recognised actor vis a vis government institutions. KOO has been key actor in national campaigns on i.a. on aid and climate change. In Austria KOO is part of the platform of development and environment NGOs “Alliance for climate justice” (http://www.klima-allianz.at/) which among other issues dealt with questions of climate finance last year and which represents NGOs vis a vis Austrian government structures. Within its own network KOO office has an important role in facilitating sharing and learning and providing service for members to develop their capacities by training as well as individual support.</p>
History of cooperation with the applicants	<p>Eurodad member since 2001. KOO is a longstanding member organisation of Eurodad and has a history of cooperation in many issues such as debt, aid, tax, climate finance within more than 10 years. KOO participates in meetings including strategic debates, conferences and calls. It benefits from reports and information exchange and contributes by addressing the issues on national level, sharing it with its 28 member organisations, invitation of Eurodad representatives to national events, advocacy and lobbying with Austrian political decision makers. KOO was an</p>

	associate in a Eurodad project on tax justice.
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 18
Full legal name	KIRKENS NØDHJELP/ NORWEGIAN CHURCH AID
EuropeAid ID number	NO-2008-GJH-2502910350
Country of Registration	Norway
Legal status	Non-profit
Official address	Bernard Getz gate 3, 130 Oslo, Norway
Contact person	Kjetil Abildsnes
Tel: country code + city code + number	+47 982 46 435
Fax: country code + city code + number	+47 22 09 27 20
E-mail address	Kjetil.abildsnes@nca.no
Number of employees	150 Head Office (900 worldwide)
Experience of similar actions, in relation to role in implementing the proposed action	Working through multiple networks worldwide.
History of cooperation with the applicants	Eurodad member since 2000. Long-standing board member of Eurodad.
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 19
Full legal name	The ONE Campaign

EuropeAid ID number	26098317349-65
Country of Registration	Belgium
Legal status	Association sans but lucrative de droit américain
Official address	Rue d'Idalie 9-13 – 1050 Bruxelles Belgium
Contact person	Tamira Gunzburg
Tel: country code + city code + number	+32 2 300 89 40
Fax: country code + city code + number	+32 2 300 89 49
E-mail address	Tamira.gunzburg@one.org
Number of employees	10
Experience of similar actions, in relation to role in implementing the proposed action	ONE has been involved in several campaigns alongside Eurodad, eg. for more transparency of the beneficial owners of European companies.
History of cooperation with the applicants	Eurodad member since 2011, working on campaigns such as transparency laws for the extractive industries.
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 20
Full legal name	Oxfam France
EuropeAid ID number	FR-2008-DYL-0907480995
Country of Registration	France
Legal status	Non-profit
Official address	104 rue Oberkampf 75011 Paris France
Contact person	Manon Aubry
Tel: country code + city code + number	+33607313355
Fax: country code + city code + number	N/A
E-mail address	maubry@oxfamfrance.org
Number of employees	33

<p>Experience of similar actions, in relation to role in implementing the proposed action</p>	<p>Oxfam France, over a 20-year experience of public opinion campaigns, has built a solid reputation as a trusted organisation amongst decision-makers, the media and the public with a supporter base of 30,000 individuals in France. The organization has played a key role in Oxfam International’s strategy on domestic resources mobilisation, building on advocacy of the other 14 affiliates of the confederation and their programs in 99 countries around the world. In France, Oxfam is a leading organization of the tax havens platform of 15 CSOs, including trade unions, and has partly lead since 2009 the collective campaign “Stop tax havens” which engage citizens, trade unions to ask tax transparency in key companies and local authorities resulting in a network of already 16 “free tax havens” French regions out of 22. Both advocacy and campaigning experience will help supporting partners’ capacities in the EU, along with inputting the research work through its large global network. Oxfam France has been managing grants with institutional donors for more than 10 years, with international private foundations and bilateral donors. Oxfam France has already managed a European Commission grant as a partner with Oxfam Germany, also regarding the call “raise of public awareness and promotion of development education in the European Union”, between 2009 and 2012. Oxfam France is also currently taking part in two EC Dear grants focusing on tax justice.</p>
<p>History of cooperation with the applicants</p>	<p>Oxfam France has been a member of Eurodad since 2000, and has been sitting on its Board for three years. Initially on debt and then mostly focusing on tax justice issues, Oxfam France has done joint advocacy and campaigning work with Eurodad, including co-production of reports like the last one early November “50 shades of tax dodging”.</p>
<p>Role and involvement in preparing the proposed action</p>	<p>Involved in discussions and consultations in developing the Strategic Plan which this Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.</p>
<p>Role and involvement in implementing the proposed action</p>	<p>Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International</p>

	Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).
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	Associate no. 21
Full legal name	Redd Barna (Save the Children Norway)
EuropeAid ID number	NO-2008-BQS-1109627073
Country of Registration	Norway
Legal status	Private And Public Law Body With Legal Form (NGO)
Official address	Storgata 38, Postboks 6902 St. Olavs plass, 0130 Oslo Norway
Contact person	Catharina Bu
Tel: country code + city code + number	(+47) 22 99 09 00
Fax: country code + city code + number	N/A
E-mail address	Catharina.bu@reddbarna.no
Number of employees	150
Experience of similar actions, in relation to role in implementing the proposed action	SCN will have no specific role in implementing the proposed action.
History of cooperation with the applicants	Eurodad member since 2011
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 22
Full legal name	Save the Children UK
EuropeAid ID number	GB-2007-CSA-2711178057
Country of Registration	United Kingdom
Legal status	Registered Charity No. 213890
Official address	1 St John's Lane, London, EC1M 4AR UK

Contact person	Jonathan Glennie
Tel: country code + city code + number	+44 (0)20 7012 6400
Fax: country code + city code + number	N/A
E-mail address	j.glennie@savethechildren.org.uk
Number of employees	700 - 800
Experience of similar actions, in relation to role in implementing the proposed action	Has been an active member of Eurodad since joining, and has participated in many collaborative actions.
History of cooperation with the applicants	Eurodad member since 2000
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 23
Full legal name	SLUG – Nettverk for rettferdig gjeldspolitikk (Debt Justice Norway)
EuropeAid ID number	N/A
Country of Registration	Norway
Legal status	NGO
Official address	Akersveien 20, 0177 Oslo, Norway
Contact person	Maren Hemsett
Tel: country code + city code + number	+47 98822582
Fax: country code + city code + number	N/A
E-mail address	slug@slettgjelda.no
Number of employees	2
Experience of similar actions, in relation to role in implementing the proposed action	Has been an active member of Eurodad since joining, and has participated in many collaborative actions as part of the network.
History of cooperation with the applicants	Eurodad member since 2000 cooperating on debt issues during the last 15 years. Director of SLUG has been a board member of Eurodad since 2014.
Role and involvement in preparing the proposed action	Involved in discussions and consultations in developing the Strategic Plan which this

	Action is designed to support. The Strategic Plan was unanimously approved members at the General Assembly.
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 24
Full legal name	African Forum and Network on Debt and Development – AFRODAD
EuropeAid ID number	N/A
Country of Registration	Zimbabwe
Legal status	Non-profit non-governmental organisation
Official address	31 Atkinson Drive, Hillside, Harare, Zimbabwe
Contact person	Dr. Fanwell Kenala BOKOSI
Tel: country code + city code + number	+263 4 778531/6 or 2912751-4
Fax: country code + city code + number	+263 4 747878
E-mail address	afrodad@afrodad.co.zw
Number of employees	18
Experience of similar actions, in relation to role in implementing the proposed action	AFRODAD is an non-state actor hub on debt and development finance in Africa. The organisation has for more than 15 years used policy research, lobby and advocacy on development finance institutions from African soil. AFRODAD has participated in EuroIFInet since 2004; partnered with Eurodad in organising NSA consultations and meetings with EU institutions and with European and International DFIs on a number of issues; and been building the capacities of NSAs in Africa on development finance. It is only important therefore that AFRODAD be partner in this important programme.
History of cooperation with the applicants	AFRODAD, formed in 1995 and registered in Zimbabwe as a Eurodad sister network and has worked on joint and/or collaborative work since formation.
Role and involvement in preparing the proposed action	AFRODAD was a member of the reference group that helped shape Eurodad's strategic plan, and therefore contributed to all the work covered in the Action. This included commenting on drafts, taking part

	in consultations, and attending the key Away Days with the Eurodad board that developed the final draft.
Role and involvement in implementing the proposed action	AFRODAD will play a key role in implementing work package A3.2, with all outcomes agreed with them. AFRODAD will also be invited to participate in capacity development trainings (A1.2.6), Strategic planning meetings and conferences (A1.1.2, A1.1.3, A1.1.4) and comment on key outputs (A1.1.1, A1.2.4, A1.3.4). They will also receive tailored communications as a result of work package A2.1.

	Associate no. 25
Full legal name	Asian People's Movement on Debt and Development (APMDD)
EuropeAid ID number	N/A
Country of Registration	Philippines
Legal status	Registered under the Philippines' Securities and Exchange Commission (SEC) in 2007, as a Non-Stock and Non-Profit Organization (CN 200704724)
Official address	No. 34 Matiyaga Street, Barangay Central District 1100 Quezon City, Philippines
Contact person	Ms. Lydinyda Nacpil, Coordinator
Tel: country code + city code + number	+63.2.9253036
Fax: country code + city code + number	+63.2.9253036
E-mail address	lnacpil@gmail.com; js.apmdd@gmail.com
Number of employees	Seven (7) - 3 full-time and 4 part-time secretariat staff
Experience of similar actions, in relation to role in implementing the proposed action	Asian People's Movement on Debt and Development (APMDD) is a regional alliance of peoples' movements, community organisations, coalitions, NGOs and networks. Established in 2001, it has and continues to actively do advocacy and campaigning with network partners such as Eurodad to demand the accountability and the fulfilment of responsibilities and obligations of governments and inter-governmental institutions; to change the processes, policies, and structures of governments and inter-governmental institutions; and to contribute to the transformation of national

	<p>and international economic and financial relations, structures and systems. APMDD currently has a dedicated program on Global Finance and Public Finance. This means we undertake a wide range of actions from research, capacity development and popular education to alliance-building, lobbying and mobilisations that nationally and regionally target the transformation of the international financial system; promoting sovereign, democratic and responsible finance; cancellation of illegitimate and unsustainable debt; and fiscal justice (e.g., taxes and spending), among others. Some concrete examples of what we do that are relevant to the main concern of the proposed Action on addressing illicit capital flight include various actions targeting international financial institutions that promote undemocratic and unaccountable financial systems and processes that have robbed many South countries of much needed resources and revenues for urgent public needs.</p>
<p>History of cooperation with the applicants</p>	<p>APMDD has been a long-standing collaborative partner of the Eurodad network in its work on debt, development finance and poverty eradication in the developing world. We build synergies in fleshing out with our experiences and struggles in the South, the shared targeting of financial institutions and both North and South governments for systems and policies that continue to undermine the development path of developing countries, enable the extraction of our resources and keep people in the South in deplorable living conditions.</p>
<p>Role and involvement in preparing the proposed action</p>	<p>APMDD was a member of the reference group that helped shape Eurodad’s strategic plan, and therefore contributed to all the work covered in the Action. This included commenting on drafts, taking part in consultations, and attending the key Away Days with the Eurodad board that developed the final draft.</p>
<p>Role and involvement in implementing the proposed action</p>	<p>APMDD will play a key role in implementing work package A3.2, with all outcomes agreed with them. APMDD will also be invited to participate in capacity development trainings (A1.2.6), Strategic planning meetings and conferences (A1.1.2, A1.1.3, A1.1.4) and comment on</p>

	key outputs (A1.1.1, A1.2.4, A1.3.4). They will also receive tailored communications as a result of work package A2.1.
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	Associate no. 26
Full legal name	Forum Solidaridad Perú – LATINDADD
EuropeAid ID number	N/A
Country of Registration	Peru
Legal status	Non-profit
Official address	Jr. Mariscal Miller 2622 Lince – Lima, Peru
Contact person	Carlos Bedoya
Tel: country code + city code + number	51+1+ 2612466
Fax: country code + city code + number	51+1+2617619
E-mail address	latindadd@latindadd.org; carlosbedoya@latindadd.org
Number of employees	9
Experience of similar actions, in relation to role in implementing the proposed action	Latindadd is currently engaged in three co-financed projects with Eurodad, continuing a long tradition of working together, coordinating strategies. Has attended Eurodad strategic development sessions and international conferences for many years, and Eurodad attends Latindadd assemblies.
History of cooperation with the applicants	Long-standing collaborative partner with Eurodad, working together across the full range of development finance issues.
Role and involvement in preparing the proposed action	Latindadd was a member of the reference group that helped shape Eurodad’s strategic plan, and therefore contributed to all the work covered in the Action. This included commenting on drafts, taking part in consultations, and attending the key Away Days with the Eurodad board that developed the final draft.
Role and involvement in implementing the proposed action	Latindadd will play a key role in implementing work package A3.2, with all outcomes agreed with them. Latindadd will also be invited to participate in capacity development trainings (A1.2.6), Strategic planning meetings and conferences (A1.1.2, A1.1.3, A1.1.4) and comment on key outputs (A1.1.1, A1.2.4, A1.3.4). They will also receive tailored communications as a result of work package A2.1.

	Associate no. 27
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Full legal name	Bank Information Center Europe
EuropeAid ID number	N/A
Country of Registration	Netherlands
Legal status	Stichting
Official address	Sarphatistraat 30, 1018 GL Amsterdam, Netherlands
Contact person	Nezir Sinani
Tel: country code + city code + number	+31614820789
Fax: country code + city code + number	N/A
E-mail address	nezir@bic-europe.org
Number of employees	5
Experience of similar actions, in relation to role in implementing the proposed action	N/A
History of cooperation with the applicants	Eurodad member since 2016
Role and involvement in preparing the proposed action	Not involved in the preparation of the action, became members after original proposal submission
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 28
Full legal name	Bretton Woods Project
EuropeAid ID number	N/A
Country of Registration	United Kingdom
Legal status	Non-profit
Official address	Bretton Woods Project c/o Action Aid 33-39 Bowling Green Lane London EC1R 0BJ United Kingdom
Contact person	Luiz Vieira
Tel: country code + city code + number	+44 (0)20 3122 0610
Fax: country code + city code + number	N/A
E-mail address	lvieira@brettonwoodsproject.org
Number of employees	4
Experience of similar actions, in relation to role in	N/A

implementing the proposed action	
History of cooperation with the applicants	Eurodad member since 2016
Role and involvement in preparing the proposed action	Not involved in the preparation of the action, became members after original proposal submission
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 29
Full legal name	CENTER FOR ECOLOGY AND SUSTAINABLE DEVELOPMENT - CEKOR
EuropeAid ID number	N/A
Country of Registration	Serbia
Legal status	Non-profit
Official address	Korzo 15/13, 24000 SUBOTICA, SERBIA
Contact person	Zvezdan Kalmar
Tel: country code + city code + number	+ 381 24 523 191
Fax: country code + city code + number	N/A
E-mail address	vodana@gmail.com
Number of employees	3
Experience of similar actions, in relation to role in implementing the proposed action	N/A
History of cooperation with the applicants	Eurodad member since 2018
Role and involvement in preparing the proposed action	Not involved in the preparation of the action, became members after original proposal submission
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

	Associate no. 30
Full legal name	National Society of Conservationists – Friends of the Earth Hungary
EuropeAid ID number	N/A

Country of Registration	Hungary
Legal status	Non-profit
Official address	Hungary, H-1091 Budapest, Üllői út 91/b
Contact person	Ákos Éger
Tel: country code + city code + number	00-36-1-2167297
Fax: country code + city code + number	N/A
E-mail address	eger.akos@mtvsz.hu
Number of employees	3
Experience of similar actions, in relation to role in implementing the proposed action	N/A
History of cooperation with the applicants	Eurodad member since 2018
Role and involvement in preparing the proposed action	Not involved in the preparation of the action, became members after original proposal submission
Role and involvement in implementing the proposed action	Will participate in the following activities: Issue-based strategic planning meetings (A1.1.2); Eurodad International Conference (A1.1.3); Eurodad Policy Forum (A1.1.4); Joint actions across Europe based on common strategies (A.1.2.5).

7. CHECKLIST FOR THE GRANT APPLICATION FORM EUROPEAID 150-053

(To be filled in by the applicant)

Name of the Applicant	European Network on Debt and Development - Eurodad
EuropeAid ID	BE-2010-FII-1201683206
Nationality ⁹⁶ / Country and date of registration ⁹⁷	Belgian / Belgium
Legal Entity File number ⁹⁸	6000270201
Legal status ⁹⁹	Non-profit
Co-applicant(s) ¹⁰⁰ (both FPA and new co-applicants (if any))	N/A
Name of the co-applicant	N/A
EuropeAid ID number	N/A
Nationality/ Country and date of registration	N/A
Legal Entity File number (if available)	N/A
Legal status	N/A
Affiliated Entity(ies)¹⁰¹	Affiliated entity n. 1
Name of the Affiliated-Entity	ActionAid UK
EuropeAid ID number	GB-2007-CRX-2711164870
Nationality / Country and date of registration	UK / UK 1977
Legal status:	Non-profit
Specify to which entity you are affiliated (applicant). Specify the kind of affiliation you have.	Eurodad / Eurodad's member

⁹⁶ For individuals.

⁹⁷ For organisations.

⁹⁸ If the applicant has already signed a contract with the European Commission.

⁹⁹ E.g. non-profit, governmental body, or international organisation.

¹⁰⁰ Add as many rows as co-applicant(s)

¹⁰¹ Add as many rows as affiliated entities

Affiliated Entity(ies)	Affiliated entity n. 2
Name of the Affiliated-Entity	Stichting Both ENDS
EuropeAid ID number	NL-2007-DSM-2711396080
Nationality / Country and date of registration	Dutch / Netherlands 1990
Legal status:	Non-profit
Specify to which entity you are affiliated (applicant). Specify the kind of affiliation you have.	Eurodad / Eurodad's member
Affiliated Entity(ies)	Affiliated entity n. 3
Name of the Affiliated-Entity	Debt & Development Coalition Ireland Ltd. – DDCI
EuropeAid ID number	IE-2008-CTF-0307464241
Nationality / Country and date of registration	Irish / Ireland 1994
Legal status:	Non-profit
Specify to which entity you are affiliated (applicant). Specify the kind of affiliation you have.	Eurodad / Eurodad's member
Affiliated Entity(ies)	Affiliated entity n. 4
Name of the Affiliated-Entity	Foundation for Development of Democratic Rights – DemNet
EuropeAid ID number	HU-2008-CVO-0303971602
Nationality / Country and date of registration	Hungarian / Hungary 1996
Legal status:	Non-profit
Specify to which entity you are affiliated (applicant). Specify the kind of affiliation you have.	Eurodad / Eurodad's member
Affiliated Entity(ies)	Affiliated entity n. 5
Name of the Affiliated-Entity	Ekvilib Inštitut – Ekvilib Institute
EuropeAid ID number	SI-2008-BGM-1103013252
Nationality / Country and date of registration	Slovenian / Slovenia 2003
Legal status:	Non-profit

Specify to which entity you are affiliated (applicant). Specify the kind of affiliation you have.	Eurodad / Eurodad's member
Affiliated Entity(ies)	Affiliated entity n. 6
Name of the Affiliated-Entity	erlassjahr.de – Entwicklung braucht Entschuldung e. V.
EuropeAid ID number	DE-2008-BER-1107489173
Nationality / Country and date of registration	German / Germany 2001
Legal status:	Non-profit
Specify to which entity you are affiliated (applicant). Specify the kind of affiliation you have.	Eurodad / Eurodad's member
Affiliated Entity(ies)	Affiliated entity n. 7
Name of the Affiliated-Entity	GLOPOLIS O.P.S.
EuropeAid ID number	CZ-2008-CCA-1606360095
Nationality / Country and date of registration	Czech / Czech Republic 2004
Legal status:	Non-profit
Specify to which entity you are affiliated (applicant). Specify the kind of affiliation you have.	Eurodad / Eurodad's member
Affiliated Entity(ies)	Affiliated entity n. 8
Name of the Affiliated-Entity	OXFAM-IBIS
EuropeAid ID number	DK-2007-DSB-2711378147
Nationality / Country and date of registration	Danish / Denmark 1970
Legal status:	Non-profit
Specify to which entity you are affiliated (applicant). Specify the kind of affiliation you have.	Eurodad / Eurodad's member
Affiliated Entity(ies)	Affiliated entity n. 9
Name of the Affiliated-Entity	Instytut Globalnej Odpowiedzialnosci – IGO
EuropeAid ID number	PL-2010-CUH-1606031493

Nationality / Country and date of registration	Polish / Poland 2007
Legal status:	Non-profit
Specify to which entity you are affiliated (applicant). Specify the kind of affiliation you have.	Eurodad / Eurodad's member
Affiliated Entity(ies)	Affiliated entity n. 10
Name of the Affiliated-Entity	Xarxa Observatori del Deute en la Globalització – ODG
EuropeAid ID number	ES-2008-BFM-2603066216
Nationality / Country and date of registration	Spanish / Spain 2000
Legal status:	Non-profit
Specify to which entity you are affiliated (applicant). Specify the kind of affiliation you have.	Eurodad / Eurodad's member
Affiliated Entity(ies)	Affiliated entity n. 11
Name of the Affiliated-Entity	Re:Common
EuropeAid ID number	IT-2012-FWZ-2604717919
Nationality / Country and date of registration	Italian / Italy 2012
Legal status:	Non-profit
Specify to which entity you are affiliated (applicant). Specify the kind of affiliation you have.	Eurodad / Eurodad's member
Affiliated Entity(ies)	Affiliated entity n. 12
Name of the Affiliated-Entity	Stichting Onderzoek Multinationale Ondernemingen – SOMO
EuropeAid ID number	NL-2007-DOM-2711209371
Nationality / Country and date of registration	Dutch / Netherlands 1973
Legal status:	Non-profit
Specify to which entity you are affiliated (applicant). Specify the kind of affiliation you have.	Eurodad / Eurodad's member
Affiliated Entity(ies)	Affiliated entity n. 13

Name of the Affiliated-Entity	Weltwirtschaft, Ökologie & Entwicklung – WEED e.V.
EuropeAid ID number	DE-2007-DOP-2711221689
Nationality / Country and date of registration	German / Germany 1990
Legal status:	Non-profit
Specify to which entity you are affiliated (applicant). Specify the kind of affiliation you have.	Eurodad / Eurodad's member

(to be filled in by the applicant: tick the relevant boxes)

Title of the Proposal: Strengthening the institutional, operational and representational capacity of the Eurodad network to undertake coordinated actions and advocate for policy changes that help ensure a democratically controlled, environmentally sustainable financial and economic system that works to eradicate poverty and ensure human rights for all.			
Before sending your Grant Application Form check that each of the criteria below have been met in full:	Yes	No	N/A
1. The correct grant application form has been used.	x		
2. The Declaration by the applicant has been filled in, signed and is attached.	x		
3. The proposal is typed and is written in an eligible language for this call and is in the same language as the one for Framework Partnership Application.	x		
4. Each additional new co-applicant has completed and signed the mandate and the mandate is included.			x
5. Each affiliated entity(ies) has completed and signed an affiliated entity(ies) 's statement and the statements are included	x		
6. The budget is enclosed, presented in the format requested, and stated in EUR.	x		
7. The logical framework has been completed and is enclosed.	x		
8. The duration of the action is equal to or higher than the minimum allowed in section 2.1.4 of the Guidelines.	x		
9. The duration of the action is equal to or lower than the maximum allowed in Section 2.1.4 of the Guidelines.	x		
10. The requested EU contribution (amount) is equal to or higher than the minimum allowed in Section 1.3 of the Guidelines.	x		
11. The requested EU contribution (amount) is equal to or lower than the maximum allowed in Section 1.3 of the Guidelines.	x		
12. The requested EU contribution as a percentage of the total eligible costs is equal to or lower than the maximum percentage allowed in Section 1.3 of the Guidelines.	x		
13. The total amount of financing requested on the basis of simplified cost options does not exceed (EUR 60 000 /threshold in 2.1.5 of Guidelines) per each applicant.	x		
14. Any additional co-applicants that were not included in the Framework Partnership Application phase, if any, and all affiliated entities are registered in PADOR and have uploaded ALL the requested supporting documents.	x		
15. The action will be implemented in an eligible country(ies) covered by the FPA.(see section 2.1.5.1 of the guidelines)	x		
16. The eligibility criteria for new co-applicants (if any) and for affiliated entities, set out in section 2.1 of the guidelines have been adhered to.	x		

5.3 Affiliated entity(ies)'s Statement¹⁰²

All affiliated entity(ies)'s Statements signed are attached to this application (see Annex 1)

¹⁰² This application form must be accompanied by a signed and dated affiliated entities' statement from each affiliated entity

8. DECLARATION BY THE APPLICANT (GRANT APPLICATION FORM)

The applicant, represented by the undersigned, being the authorised signatory of the applicant, in the context of the present call for proposals, representing any co-applicant(s), affiliated entity(ies) in the proposed action, hereby declares that

1. the applicant has the sources of financing specified in Section 2 of the Guidelines for Applicants;
2. the applicant has sufficient financial capacity to carry out the proposed action or work programme;
3. the applicant certifies the legal status of the applicant, of the co-applicant(s) and of the affiliated entity(ies) as reported in part 3, 4, and 5 of this application;
4. the applicant, the co-applicant(s) and the affiliated entity(ies) have the professional competences and qualifications specified in Section 2 of the Guidelines for Applicants;
5. the applicant undertakes to comply with the obligations foreseen in the affiliated entity(ies)'s statement of the grant application form and with the principles of good partnership practice;
6. the applicant is directly responsible for the preparation, management and implementation of the action with the co-applicant(s) and affiliated entity(ies), if any, and is not acting as an intermediary;
7. The applicant, the co-applicant(s) and the affiliated entity(ies) are not in any of the situations excluding them from participating in contracts which are listed in Section 2.3.3 of the Practical Guide (available from the following Internet address: <http://ec.europa.eu/europeaid/prag/document.do?locale=en>.) Furthermore, it is recognised and accepted that if the applicant, co-applicant(s) and affiliated entity(ies) (if any) participate in spite of being in any of these situations, they may be excluded from other procedures in accordance with Section 2.3.4 of the Practical Guide;
8. the applicant and each co-applicant and affiliated entity (if any) is in a position to deliver immediately, upon request, the supporting documents stipulated under Section 2.4 of the Guidelines for Applicants.
- 9. the applicant and each co-applicant and affiliated entity (if any) are eligible in accordance with the criteria set out under Section 2.1.1 of the Guidelines for Applicants;**
10. if recommended to be awarded a grant, the applicant, the co-applicant(s) and the affiliated entity(ies) accept the contractual conditions as laid down in the Specific Grant Agreement annexed to the Guidelines for Applicants (annex G);
11. the applicant, the co-applicant(s) and the affiliated entity(ies) are aware that, for the purposes of safeguarding the financial interests of the EU, their personal data may be transferred to internal audit services, to the European Court of Auditors, to the Financial Irregularities Panel or to the European Anti-Fraud Office.

These are the sources and amounts of Union funding received or applied for the action or part of the action or for its functioning during the same financial year as well as any other funding received or applied for the same action

<list source and amount and indicate status (i.e. applied for or awarded)>

The applicant is fully aware of the obligation to inform without delay the Contracting Authority to which this application is submitted if the same application for funding made to other European Commission departments or European Union institutions has been approved by them after the submission of this Grant application Form.

The applicant acknowledges that according to Article 131 (5) of the Financial Regulation of 25 October 2012 on the financial rules applicable to the general budget of the Union (Official Journal L 298 of 26.10.2012, p. 1) and Article 145 of its Rules of Application (Official Journal L 362, 31.12.2012, p.1) applicants found guilty of misrepresentation may be subject to administrative and financial penalties under certain conditions.

Signed on behalf of the applicant

Name

Signature

Position

Date

9. ASSESSMENT GRID FOR THE GRANT APPLICATION FORM

(For the use of the Contracting Authority only)

	YES	NO
ADMINISTRATIVE CHECK		
1. The submission deadline has been met.		
2. The Checklist has been duly completed.		
Administrative compliance has been checked by: Date:		
<u>DECISION 1:</u> The Committee has decided to check the eligibility of the Grant application, which has passed the administrative check.		
3. The co-applicants which were not part of the original FPA (if any) satisfy the eligibility criteria in section 2.1		
4. The affiliated entity(ies) satisfy the eligibility criteria in section 2.1.3.		
5. The supporting documents listed below were submitted in PADOR in accordance with the Guidelines (Section 2.4)		
a. The statutes or articles of association of the co-applicants that were not part of the original FPA, and the affiliated entity(ies)		
b. The applicant's external audit report (if applicable) if the grant application is submitted more than one year after the signature of the FPA		
c. Copy of the applicant's latest accounts if the grant application is submitted more than one year after the signature of the FPA		
Eligibility has been assessed by: Date:		
<u>DECISION 2:</u> The Committee has checked the proposal's eligibility under the criteria laid down in the Guidelines for Applicants and has decided to proceed with the evaluation of the Grant Application.		
The Grant application has been evaluated by: Date:		
<u>DECISION 3:</u> A. The proposal has been provisionally selected as one of the top ranked proposals within the criteria set in section 2.4.3 of the Guidelines for applicants and the Committee has selected it for awarding a grant.		
<u>B. The proposal has been put on the reserve list as one of the top ranked proposal.</u>		
The proposal has been evaluated by: Date:		

LOGFRAME MATRIX OF THE PROJECT

The logframe matrix should evolve during the project lifetime: new lines can be added for listing new activities as well as new columns for intermediary targets (milestones) when it is relevant and values will be regularly updated in the column foreseen for reporting purpose (see “current value”).

	Results chain	Indicators	Baseline (incl. reference year)	Past value 31/12/2020	Current Value 31/12/2021	Targets (incl. reference year)	Sources and means of verification	Assumptions
Overall objective: Impact	OO1 - To strengthen the capacity of the Eurodad network to undertake coordinated actions and advocate for policy changes that help ensure a democratically controlled, environmentally sustainable financial and economic system that works to eradicate poverty and ensure human rights for all.	OO1.1 - Number of EU countries where Eurodad has members that take part in collective actions	18 countries (2017)	25 countries (2020)	25 countries (2021)	27 Countries (2022)	General Assembly minutes (which record Eurodad members' elections and departures), updated list of members	
		OO1.2 - Number of achieved CREAM ¹ strategic objectives set by Eurodad members to achieve policy change in the area of development finance.	4 (2017)	4 (2020)	6 (2021)	7 (2022)	Statements, policies and rules agreed by European governments and multilateral organisations Meeting minutes with European governments and multilateral institutions	
Specific objective(s) : Outcome(s)	SO1 – To strengthen the <i>institutional, operational, and representational capacity of Eurodad, including the role and responsibilities of Eurodad network members</i> for coordinated advocacy at European level on an expanded	SO1.1 – Number of coordinated advocacy actions at European or global level	To be developed in Y1	43 (2020)	70 (2021)	84 (2022)	Meeting minutes between partners on joint actions/ coordinated actions	Policy change leading to significant changes in the financial and economic system to have major impact on poverty eradication and human rights is
		SO1.2 – Number of target group participants in coordinated European or global advocacy actions	To be developed in Y1	4,567 (2020) With 50.57% women	7,124 (2021), with 50% women	7000 (2022), with 50% women	Advocacy materials such as joint letters, position papers, or campaign actions Evaluation reports	

¹ Clear, Relevant, Economic, Adequate, Monitorable

	number of development finance issues, including coordinated national level action across European states, and the capacity of Eurodad to reinforce global coalitions and networks.	SO1.3 – Number of target group participants trained in advocacy planning and other issues relevant to overall objectives of the action	To be developed in Y1	907 (2020) with 58.06 % women	1,580 (2021), with 59.03% women	1500 (2022) with 50% women	Meeting minutes between partners on joint actions/ coordinated actions Advocacy materials such as joint letters, position papers, or campaign actions Evaluation reports	adopted at EU and or international level.
		SO1.4 – Number of EU member states with Eurodad members and allies that participate in European or global advocacy actions	18 (2017)	24(2020)	25 (2021)	27 (2022)	Updated list of members and allies and countries with strategy meetings participants reported.	
Outputs	O1. Issue-based workplans, including new issues, agreed by all Eurodad members as a result of coordinated planning process	O1.1 – “number of new cross-cutting issues integrated in the workplans of Eurodad priority thematic areas”.	0 (2018)	2 (2020)	3 (2021)	3 (2022)	Eurodad General Assembly minutes (which record approval of annual Eurodad workplans) and annual workplans	Coordinated civil society actions can influence European governments.
	O2. Guidelines for strategic advocacy planning agreed for use by Eurodad network	O2.1 –Strategy Implementation Plan approved by Eurodad board	0	0	1 (2021)	1 (2021)	Eurodad KMP	There are civil society organisations interested or working on development finance policy in all EU MS.
	O3. Strategic planning meetings for Eurodad members and allies	O3.1 - Number of Strategic Planning meetings organised and attended by at least 20 Eurodad members and allies	3 (2017)	13 (2020)	21 (2021)	30 (2023)	Notes of meetings Attendance lists	Sufficient resources and interest from Southern partners to join global coalitions.
	O4. Advocacy and Communications Toolkit used to train target audience	O4.1 Toolkit O4.2 Number of capacity development trainings using the tool kit	0 0	1 (2020) 9 (2020)	1 (2021) 20 (2021)	1 (2021) 25 (2023)	Eurodad KMP Attendance lists	Funders remain interested in

	05. Advocacy Strategies approved by Eurodad board in new work areas	O5.1 Number of Advocacy Strategies in new work areas approved by Eurodad board	0	3 (2020)	3 (2021)	3 (2022)	Advocacy strategy document Eurodad board minutes	supporting development finance advocacy.
	06. Agenda Setting Reports and briefings in new issue areas	O6.1 – Number of Agenda Setting Reports and briefings in new issue areas approved by Eurodad board.	0	5 (2020)	10 (2021)	12 (2023)	Eurodad website	
	07. Eurodad updates covering secretariat, network and issues-related news circulated to members and allies	O7.1 – Eurodad updates covering secretariat, network and issues-related news circulated to members and allies	0	2 (2020)	7 (2021)	8 (20-22)	Eurodad Updates Email distribution list and new CRM system	
	08. Activists Guides	O8.1 Number of Activists guides produced	0	6 (2020)	6 (2021)	7 (2022)	Eurodad KMP website	
	09. The Eurodad network is extended to include members or active allies in all EU member states	O10.1 – Number of EU member states which currently do not have a member that have members or active allies	0	8 (2020)	9 (2021)	9 (2022)	Eurodad General Assembly Minutes (which record approval of new members) Eurodad Annual Reports (which list members)	
Activities	<p><u>CLUSTER 1 ACTIVITIES:</u></p> <p><i>Advocacy Planning Coordination System (work package A1.1):</i></p> <p><i>A1.1.1 - Strategy Implementation Plan approved by Eurodad board (1)</i></p> <p><i>A1.1.2 - Issue-based strategic planning meetings (14)</i></p> <p><i>A1.1.3 - Eurodad International Conference (2)</i></p>			<p><u>MEANS:</u></p> <p><i>Given the nature of Eurodad as set out in the Strategic Plan, and the focus of this Action on capacity development, the majority of the means of implementation will be the staff time of Eurodad secretariat and affiliate staff, as set out in the budget.</i></p> <p><i>In addition, the following means of implementation have been identified and are included and explained in full in the budget, attached as an Annex:</i></p> <ul style="list-style-type: none"> <i>Travel (both international and local) for country visits meetings, conferences, seminars and training sessions</i> <i>Equipment and supplies (office furniture sets and computers for new staff, plus upgrades to IT infrastructure equipment.)</i> 			<p><i>There is a (outstanding) need and added-value of the outputs Eurodad produces.</i></p> <p><i>Action proposal agreed by European Commission.</i></p> <p><i>Advance of costs for Action received from</i></p>	

	<p>AI.1.4 - Eurodad Policy Forum (1)</p> <p>AI.1.5 - Revision of guidelines (1)</p> <p>AI.1.6 - 2nd Revision of Guidelines (1)</p> <p>Policy, Advocacy and Communications Toolkit (Work package AI.2):</p> <p>AI.2.1 - Concept note and plan for capacity assessment (1)</p> <p>AI.2.2 - Capacity assessment and audit of network (1)</p> <p>AI.2.3 - Plan for Knowledge Management Platform production and dissemination (1)</p> <p>AI.2.4 – Knowledge Management Platform produced (1)</p> <p>AI.2.5 - Joint actions based on common strategies (84)</p> <p>AI.2.6 - Capacity development training (25)</p> <p>Strategies and Workplans for New Issue Areas (work package AI.3):</p> <p>AI.3.1 - Scoping studies (3) and background briefings (3)</p> <p>AI.3.2 - Issue Steering Group meeting (3)</p>		<ul style="list-style-type: none"> Local office costs (a proportion of office rent and consumables, and other expenses including telephone costs.) Other costs, services (including audit, evaluation, and translation costs) <p>Other (Publication editing, design and printing for guidelines, plans, strategies, toolkit, studies, briefings, reports, newsletters and guides; events costs – venue catering and services for seminars, away days, conference, training courses, meetings and assemblies, and consultancy costs for specific activities that require specialist expertise including website upgrade, fundraising expertise, expertise to support the evolution of the Eurodad Management structure, MEL, CRM system upgrade; recruitment costs)</p> <p><u>COSTS</u></p> <p>The <u>budget of the Grant</u> is:</p> <ul style="list-style-type: none"> EUR 5,669,736 for the total duration of the action; and EUR 1,591, 062 for its first 12 months; <p>Eurodad has designed this Action with the affiliates, and agreed the associated budget to deliver an excellent ratio between estimated costs, and the very considerable results described above.</p> <p>The budget has been carefully designed to ensure that all the activities of the Action are appropriately reflected, and that quantities and costs reflect what is necessary and sufficient to implement them successfully, taking into account other resources available across the network. Full details can be found in Annex to this application, including a <u>justification</u> for each item.</p> <p>The <u>amount requested from the Contracting Authority</u> is EUR 4,535,789, with the rest being provided as co-funding from other resources from Eurodad and affiliates.</p> <p>No contributions in kind will be provided.</p> <p><u>SOURCES OF INFORMATION ON ACTION PROGRESS</u></p> <p>Interactive discussion during Project Planning and Evaluation Meetings (Activity A4.2.1) and teleconferences (Activity A4.2.2)</p> <p>Annual updates of Communication Plan (A4.2.11) tracking visibility of the</p>	<p>European Commission.</p>
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	<p><i>A1.3.3 - Workplan for year 1 (3)</i></p> <p><i>A1.3.4 - Advocacy strategy (3)</i></p> <p><i>A1.3.5 - Workplan for year 2, based on advocacy strategy</i></p> <p><i>A1.3.6 - Seminar (3)</i></p> <p><i>A1.3.7 - Agenda-setting Report and briefings (3)</i></p> <p><u>CLUSTER 2 ACTIVITIES</u></p> <p><i>Communications Outreach Plan (Work package A2.1):</i></p> <p><i>A2.1.1 - Audience Review (1)</i></p> <p><i>A2.1.2 - CRM Review (1)</i></p> <p><i>A2.1.3 - Website upgrade (1)</i></p> <p><i>A2.1.4 –Communications improvements (60)</i></p> <p><i>A2.1.5 - Social media review (1)</i></p> <p><i>A2.1.6 - Eurodad updates (8)</i></p> <p><i>A2.1.7 - Activists guides (7)</i></p> <p><i>New Members Recruitment Plan (Work package A2.2)</i></p> <p><i>A2.2.1 – Updated mapping of potential members (1)</i></p> <p><i>A2.2.2 - Target outreach plan (4 as updated annually)</i></p> <p><i>A2.2.3 - Eurodad membership</i></p>		<p><i>Action, reported to the Commission for feedback.</i></p> <p><i>Quarterly and annual collection of achievements against activities and results in Living Logframe, as part of MEL Framework (Activity A4.2.7) – based on the OVIs and sources above.</i></p> <p><i>Quarterly review of Risk Management Framework by Programme Leader, with discussion at Project planning teleconferences (Activity A4.2.2) and full update in advance of discussion at Project Planning and Evaluation Meetings (Activity A4.2.1)</i></p> <p><i>Internal reviews of progress against activities and results at Eurodad Staff Away Days (Activity A4.2.3)</i></p> <p><i>Review of achievements against the Action’s Objectives and Results during the MEL Framework update (Activities A4.2.6 and A4.2.7)</i></p> <p><i>Review of achievements against Objectives and Results by the Eurodad Board at Annual Face to Face meeting (A4.2.4) and Eurodad General Assembly of all members (A4.2.5)</i></p> <p><i>Full review of the whole logframe during the review of the Strategic Plan, including an external evaluation (A4.2.8) and Strategic Review Away Days (A4.2.9) that will involve the Eurodad Board and partners from developing countries, which will develop a new Strategic Plan, to be approved by the Eurodad General Assembly the following year.</i></p>	
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	<p><i>benefits summary (1)</i></p> <p><i>A2.2.4 - Country visits (18)</i></p> <p><i>A2.2.5 - New member capacity development plans (9)</i></p> <p><u>CLUSTER 3 ACTIVITIES:</u></p> <p><i>Joint Strategy Development with Global Partners (Work package A3.1):</i></p> <p><i>A3.1.1 - Scoping of potential partners (1)</i></p> <p><i>A3.1.2 - Participation in global and regional strategic discussions (48)</i></p> <p><i>Organisational Development Support for DAD Networks (Work package A3.2)</i></p> <p><i>A3.2.1 – Quarterly telecons (16)</i></p> <p><u>CLUSTER 4 ACTIVITIES:</u></p> <p><i>Recruitment of New Staff (Work package A4.1):</i></p> <p><i>A4.1.1 – Phase 1 – recruitment of programme management staff, evolution of Eurodad management structure.</i></p> <p><i>A4.1.2 – Phase 2 – Recruitment of staff to work on new issues</i></p> <p><i>Planning and Evaluations (Work package A4.2):</i></p> <p><i>A.4.2.1 - Project planning and</i></p>			
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	<p><i>evaluation meetings (5)</i></p> <p><i>A4.2.2 - Project planning teleconferences (16)</i></p> <p><i>A4.2.3 - Staff Away Days (9)</i></p> <p><i>A4.2.4 - Eurodad Board face to face meetings (4)</i></p> <p><i>A4.2.5 - Eurodad General Assemblies (4)</i></p> <p><i>A4.2.6 - MEL Framework review (1)</i></p> <p><i>A4.2.7 – Updated MEL Framework (1)</i></p> <p><i>A4.2.8 – Strategy renewal evaluation (1)</i></p> <p><i>A4.2.9 – Strategy renewal away days (2)</i></p> <p><i>A4.2.10 – Final Evaluation (1)</i></p> <p><i>A4.2.11 - Communication Plan (1)</i></p> <p><i>Fundraising Pipeline Planning System (Work package A4.3):</i></p> <p><i>A4.3.1 - Research summaries of hitlist donors (12)</i></p> <p><i>A4.3.2 - Concept notes for each issue area + cross cutting issues (10)</i></p> <p><i>A4.3.3 - Relationship management and assessment of all hitlist funders (1)</i></p>			
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	<i>A4.3.4 - Monthly updates on relationships with hitlist (54)</i>			
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