

## CALL FOR TENDER

### Evaluation of the application of the FES Trade Union Pathways in the trade union work in Africa

**Please note:**

**Offers that do not comply with the below criteria will not be considered in the selection process:**

- Sound methodological knowledge in the field of evaluations;
- Experience with evaluations;
- Expertise in labour studies and gender transformative approaches in project work;
- Regional/specific knowledge of the selected countries DRC, Kenya, Nigeria, and Ghana;
- Proficiency in written and spoken English and French.

#### 1. Rationale for evaluation

Projects in the international work of the Friedrich-Ebert-Stiftung (FES) are regularly evaluated externally. Evaluations have several aims and purposes. Firstly, they objectively and systematically monitor the success of project work and thus serve to ensure quality and accountability to third parties. The evaluation of project work is intended to recognise needs and opportunities for reorientation and readjustment in good time. This may also include reviewing the organisational structures to determine the extent to which they are suitable for achieving the desired objectives. Evaluations, therefore, also support the strategic development of the projects and contribute to institutional learning overall.

In this context, the **trade union work of the FES in Africa in the period 2018 to 2025** shall be evaluated. The evaluation is commissioned by Trade Union Competence Center (TUCC) of FES based in Johannesburg, South Africa.

In order to obtain a comprehensive picture, the evaluation focuses on the internal advisory work of the TUCC, an in-depth evaluation of the trade union work in the three to four country projects of Nigeria, Kenya and Democratic Republic of Congo, and optionally Ghana, and an overview survey on the trade union work of all 19 FES projects in Africa.

## 2. Political framework conditions

Africa remains confronted by high levels of poverty, hunger and lack of formal employment. The majority of its population has found their livelihood in the informal sector or other forms of precarious employment to survive. More than 80% of workers in Africa are in the informal economy, where conditions are characterised by low income, unsafe working conditions, lack of legal protections, lack of social benefits and the threat of constant harassment from the police. Women account for over 74% of informal economy employment, when agriculture is excluded, and are, therefore, particularly affected by decent work deficits.

The above situation happens on a continent that commands huge amounts of minerals that are extracted and exported to fund value-adding industrialization abroad. Due to high levels of debt, lack of local financial resources and indigenous corporations to invest in the extraction and processing of its raw materials, Africa has relied on foreign companies, MNCs, as the main source of investments. But MNCs have exploited the structural and governance weaknesses on the continent, contributing to land dispossession, violation of human and workers' rights, pollution of soil, water and air and forcing massive concessions on countries including lowering of labour standards. In many cases they pay less taxes and exploit weak financial controls that aid illicit financial flows from the continent, depriving it of massive resources that could support economic and social development.

The challenges evolving from climate change make a compelling case for a transition to diverse, inclusive and sustainable economic structures. Such a transition could leverage the wealth of natural resources that Africa is endowed with, including critical minerals, that are crucial for the production of renewable technologies. This means critical minerals offer Africa an opportunity to transform its economies, address climate challenges and gain a significant political voice in the ongoing global climate talks.

To address these challenges and to drive an inclusive transformation, trade unions that genuinely stand up for the interests of workers and employees, are indispensable in the fight for the goals of democracy, social justice and sustainability. Accordingly, trade unions need to overcome their current crisis of representation and improve on their internal decision-making processes. This will include building power by organising among informal and digital workers and to develop strategies tailored to represent the concerns and interests of these workers who have remained outside the unions. It also includes the need to overcome the current fragmentation of unions to build a united movement that can be an effective ally of other social movements to drive transformation.

In light of this context, FES Africa department has been rethinking its trade union work and refocusing its strategies of engagement.

## 3. Background information on the project

Friedrich-Ebert-Stiftung (FES) has been working with its partners on the African continent for more than 50 years. FES is committed to the values of social democracy. Historically, social democracy has aimed at the emancipation of the working class and a free society based on equal opportunity for economic, social, cultural and political participation. Its major political struggles – fighting for

workers' rights, for a fair distribution of power and wealth as well as for peace and international solidarity – are ongoing today and as important as ever in the everchanging world of work.

In 2009, as part of the development of a focused Africa strategy, the FES placed even greater emphasis on trade union work. It was decided to set up a competence center for trade union work in Sub-Saharan Africa in Johannesburg in 2010, which designs and implements regional trade union work in Sub-Saharan Africa and contributes to the further development of national trade union strategies. In 2018, the department's trade union work was realigned at both national and regional level through an Africa-wide strategy process involving all national projects resulting in the development of the FES Africa Trade Union Pathways.

In 2016, a three-year project “Reform of trade union structures in Sub-Saharan Africa” started under the leadership of the TUCC with the participation of the countries Botswana, Mali, Kenya, Nigeria and Zimbabwe. The focus was on analyzing the strengths and weaknesses of selected trade unions and practical steps to increase participation of their members in the organisations. To a certain extent, the project served as a field of experimentation in trade union cooperation and to find a new role for the FES. Experiences from the project were directly incorporated into the development of the “Trade Union Pathways”.

The latter were developed in 2018 by means of an Africa-wide strategy process involving all national projects and served to realign trade union cooperation at both national and regional level. The decision to focus more strongly and to take a joint approach to trade union work has increased the demand for internal advice from the TUCC. These Pathways constitute the binding strategy of supporting trade unions in two different, but connected ways:

- Firstly, we are committed to strengthening trade unions as actors in shaping transformation for a just society.
- Secondly, we are committed to supporting trade unions in transforming themselves as a strong and representative force that the working class needs to fight for its rights in today's capitalist world.

In 2019, the Africa Department held a first internal evaluation of the implementation of the “Trade Union Pathways” in all participating projects, followed by a short survey on established working lines by 2020, from which first lessons learnt and recommendations were drawn. In 2021, an updated version of the “Trade Union Pathway Strategy” was endorsed.

From the formation of the TUCC, its strategy has been closely linked to the Global Trade Union Project of FES, based in headquarters. In 2022 the previously two international departments of FES merged into the Division of International Cooperation (IC). In order to align the trade union work of the departments in the new division, to exchange about the diverse realities of our international trade union work and to adapt the work to changing framework conditions (geopolitical shifts, consultation needs of our partners, strengths and weaknesses of the workers' movement etc.) a division-wide conference was held to develop guidelines for our trade union work – the latest strategy document at the FES global level. The FES Africa Trade Union Pathways have informed the preparations of the conference and their strategic approach has been re-affirmed.

#### 4. Objectives, object of evaluation and key questions

The objective of the evaluation is to **take stock of the implementation of the Trade Union Pathways in the 19 country offices of FES Africa to draw lessons for project planning and possible further development of the strategy**. Therefore, the following is expected:

- an overview survey in all 19 country offices of FES Africa;
- an in-depth evaluation in DRC, Nigeria, Kenya, and optionally Ghana ;
- an evaluation of the internal advisory work of TUCC.

The object of the evaluation is the FES trade union work on the African continent, which is supported and continuously further developed by the Trade Union Competence Centre. The work is based on the Africa Department's Trade Union Pathways.

The support of trade unions is at the core of FES' raison d'être and is internally often described as part of the organisation's "DNA". The overarching aim of the evaluation therefore is to assess whether, in its trade union work on the African continent, FES lives up to the objectives and principles formulated in its departmental framework documents.

Concretely, the evaluation **aims to analyse how the two Trade Union Pathways – trade unions shaping transformations and transformation of trade unions - are implemented into concrete transformative work approaches in selected countries**, what challenges are faced and how they are overcome. It also **aims to identify in how far the Trade Union Pathways and FES Trade Union Competence Centre provide adequate internal advice and support to the offices**.

The evaluation should **provide implementable recommendations for the improvement of FES national trade union work in Africa**. These should help to sustainably strengthen FES approaches with the objective to strengthen free, democratic and independent trade unions.

The evaluation is based on the OECD-DAC criteria for evaluation in the area of international cooperation. The evaluation will be guided by the criteria **relevance, impact, coherence and effectiveness**. The following **key questions** will be analysed as part of the evaluation:

##### Strategic orientation

- What work approaches/strategies does FES pursue to put the objectives of the Trade Unions Pathways into practice?
- What topics do the offices work on with their trade union partners?
- In how far is the trade union work linked to/integrated into other working lines of the national offices?
- In how far do the activities of the FES Global Trade Union Project that are implemented by national offices align with the national strategies?
- FES in Africa has identified Just Transition as a future focus area. Hence, the trade union work will have to be oriented more towards this topic. What promising strategies and approaches

are already being implemented? What recommendations for a stronger focus on Just Transition of FES Africa's trade union work can be made?

*In-depth questions for selected countries:*

- Is the Trade Union work more based on demand or on supply? In how far is the work suited to the needs and capacities of the partner organisations and the target groups?
- To what extent is the work of the evaluated offices effective and impactful vis-à-vis the objectives of Trade Union Pathways? Is there a need for adaptation of the Pathways, and if so, how and in what way?
- What goals and what theory of change does the FES have in its trade union support work in Africa? Are the objectives relevant and appropriate to the political context?
- In what way are the gender justice pathways of the FES Africa department integrated into the approaches of the trade union work at the national level (both regarding content and actors involved)?

**Partner relations and network**

- Do the trade union partners of FES know FES' strategic approach to trade union work? Do they agree with it?
- Have there been changes in the partner networks since the introduction of the TU Pathways? In what way?
- What type of trade union partnerships and partnerships with other worker organisations are maintained (federations or sector unions? private or public sector? Associations of informal workers...)? Why do we work with exactly the partners we work with? And shall we continue to do so?
- Which other actors/movements (feminist movement?, climate justice movement?, political parties? etc.) are involved in trade union work and vice versa? Are feminist partners involved in the gender justice work with trade unions? If so, how? If not, why not?
- How do the national offices work together with/make use of regional secretariats of Global Union Federations in their work? In how far are synergies between the national, regional and global level of trade union work made use of? Is there room for improvement?

*In-depth questions for selected countries:*

- What would partner organisations like to do more of with FES? What would they like to do less of?
- What role does FES play in the labour movement of the selected country in relation to its partners and in comparison with other international trade union support organisations/development institutions working with trade unions?
- Are there any synergies or challenges in relation to other international trade union support organisations/development institutions working with trade unions?

## Effectiveness

### In-depth questions for selected countries:

- Which work approaches have proven to be particularly effective? Which ones should be reduced or abandoned? What new approaches would be useful?
- What direct results (output) has the trade union work in each evaluated office achieved?
- How are FES partner organisations benefitting from the FES activities in general (outcome)?
- Has the trade union work in the selected offices advanced gender justice? Have persons of different genders been affected differently by the FES trade union work? If so, how and why?
- Which innovative and gender transformative approaches are recognizable (good practices)? What characterizes them? What results have they achieved?

## Impact

- What are risks that can stand in the way of successful implementation?

### In-depth questions for selected countries:

- Has FES trade union work in the selected countries assisted trade unions to transform policies? Have these policies led to a tangible improvement of the situation of workers?
- Has FES trade union work in the selected countries lead to a transformation of the trade unions as intended in the Trade Union Pathways? If so, has the transformation lead to more gender justice in the trade unions themselves and in the way they are trying to influence policy? (Compare Trade Union and Gender Justice Pathways).
- Which unintended impacts (positive or negative) has the trade union work of FES had?

## Institutional change and strategic advice by TUCC

- What support and advice have the FES country offices requested and/or received from the Trade Union Competence Center with regard to their work on trade unions? What additional support would be required and helpful for the work of the national offices on the implementation of the Trade Union Pathways?
- How do the offices evaluate the annual Trade Union Pathway trainings organised by the TUCC since 2022?
- Do the trade union coordinators exchange regularly with trade union coordinators from other offices and/or program managers from the TUCC?
- What contribution can the country offices and the TUCC offer to international debates around labour issues and to the FES divisional Trade Union advisory team (as well as the teams on Gender Justice, Decent work and just economy, and Energy and Climate Justice) and how can they make better use of the advisory teams?

## 5. Evaluation design and methodology

The evaluation must meet the standards of validity and reliability. A mix of methods is desired in which the method selected is geared towards the type of question the evaluation seeks to answer and the findings of the evaluation are triangulated by applying other methods. Individual or group interviews, focus group discussions, surveys using a standardised questionnaire, systematic document evaluation, participant observation, statistical evaluation of series of measures, etc. are conceivable. Innovative methodological approaches such as outcome mapping can also be used. FES attaches particular importance to evidence-based statements in evaluations. Opinions must be kept strictly separate from the results of analyses. Gender aspects should be taken into account in the proposed study design and in the methods used. During the field phase, care should be taken to ensure a gender-balanced composition of the programme and selection of interviewees.

## 6. Procedure and services of the evaluation team

### 1. Kick-off and preparation

- Kick-off meeting with those responsible at FES to clarify the assignment
- Document analysis
- Conducting exploratory interviews with FES staff

### 2. Inception Report

- Preparation of an inception report.
- Presentation of the draft of the inception report to those responsible at FES (online or hybrid). The draft or outline should be handed in at least 3 working days before the workshop.
- Submission of the final version of the inception report.
- Scope and form:
  - Approx. 5-10 pages
  - Language: English
  - Gender-sensitive language
  - Proposed outline:
    - i. Brief description of the understanding of the evaluation project (evaluation object and insight to be gained from the evaluation)
    - ii. Statements on the theory of change of the evaluation object:
      - What theory of change are the Trade Union Pathways of FES Africa based on?
      - How have the theory of change changed during the period under review?
      - What were important interim goals and possible risks?
    - iii. Initial findings/theses on the key questions of the evaluation

- iv. Presentation of the evaluation design and methodological approach, including selection of interview partners and information on possible obstacles to data collection
- v. Next steps

### 3. Data collection and analysis

- Online survey of all 19 FES Africa projects
- Preparation of the data collection (coordination of dates, organisation and logistics of the field phase) is carried out in close consultation with FES
- Data collection online or on site in the evaluated countries Nigeria, Democratic Republic of Congo, Kenya, and optionally Ghana
- Analysis, triangulation and synthesis of the collected data

### 4. Final report

- Preparation of the final report and the summary report in accordance with the Terms of Reference.
- Presentation of the draft final report to those responsible at FES (online or hybrid). The draft final report should be sent out at least 3 days in advance.
- Submission of the final version of the final report and the summary report.
- Scope and form of the *final report*.
  - Approx. 35 - 40 pages (without appendices)
  - Language: English
  - Use of gender-sensitive language
  - Proposed outline:
    - i. Brief description of the evaluation project (object of evaluation and insight to be gained from the evaluation)
    - ii. Evaluation design and methodology (data collection instrument and data analysis methods)
    - iii. Results of the analysis of the key questions
    - iv. Recommendations
    - v. Annex: e.g. interview guidelines, analysis grid, list of interviewees (anonymised), other relevant documents
- Scope and form of the *abstract*:
  - Approx. 2-4 pages
  - Language: English
  - Use of gender-sensitive language
  - Fixed outline:
    - i. Background information on the project
    - ii. Evaluation question
    - iii. Results and recommendations

## 7. Timetable and deadlines

The timetable below is a generic template that includes the items that are expected from FES. In your proposal, please add additional points that demonstrate the steps that you are suggesting according to your methodology. Please outline your timelines within the given period and the number of days you are calculating per step.

Period	Tasks	Days (estimated)
July 2025	Kick-off meeting to clarify the assignment	
	Document study by evaluation team	
	Exploratory interviews with selected FES staff	
	Preparation of inception report (draft)	
	Presentation and discussion inception report (draft); the draft should be sent to FES at least three working days before the presentation; Subsequent revision if necessary Submission of the final inception report	
	Data collection/field research in the selected countries	
	Preparation of the draft final report; the draft should be sent to FES at least three working days before the presentation	
	Presentation and discussion of the draft final report; Subsequent revision if necessary	
	Presentation and discussion of the evaluation results focusing on the recommendations during TUCC Pathways Training in November	
November 2025	Submission of final report and summary report (final versions)	
Estimated total duration		

## 8. Qualification of the evaluator or the evaluation team

The main qualification requirements are sound methodological knowledge and experience in the field of evaluation, expertise in labour studies and gender transformative approaches in project work, regional/specific knowledge of the selected countries DRC, Kenya, Nigeria, and optionally Ghana and proficiency in written and spoken English and French.

Additional qualifications include: understanding and experience in the labour movement, proficiency in written and spoken German, sound understanding of the work of German political foundations and FES in particular as well as trade union support work by other international organizations.

## 9. Documents to be submitted

1. Detailed concept (as per points 4, 5,6)
2. Customized timetable (as per point 7)
3. Detailed budget:
  - Specified cost for evaluation of field research for Nigeria, DRC, Kenya and Ghana (please indicate the cost for the field research for each country);
  - Please note, the case of Ghana is optional and the inclusion or exclusion of the country in the evaluation will be decided based on the overall cost of the evaluation;
4. CVs of the team of evaluators, indicating main point of contact and their substitute.

## 10. Criteria for the assessments of the proposals received

- **30% cost**
- **70% concept**, including implementation plan, methodological approach and human resource allocation.

## 11. Miscellaneous

The evaluator/ evaluation team must treat all information and findings gathered in the course of the research as confidential. The copyright of the evaluation lies with FES.

1/3 of the fee will be paid after acceptance of the inception report by FES, the remaining fee will be paid after acceptance of the final report and the summary and fulfilment of all contractually agreed services. Other payment modalities can be included in the offer and will be agreed in consultation with FES. If the evaluator/ evaluation team fails to deliver, they will neither be entitled to full or partial payment.

## 12. Contact persons

- **For questions regarding content:**  
**Kathrin Meißner**, Director TUCC, [kathrin.meissner@fes.de](mailto:kathrin.meissner@fes.de).  
**Britta Utz**, Trade Union Coordinator Subsaharan-Africa, Africa Department, International Cooperation Division, FES Berlin and
- **For questions on quality standard: Giang Pham**, responsible for evaluation supervision, International Cooperation Department, FES Berlin.

## 13. Submission of Proposals

Please submit your proposal **latest by June 16, 2025, as PDF file** to: [Kathrin.meissner@fes.de](mailto:Kathrin.meissner@fes.de).