

Quick guide to perspectives

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Union to Union compiled these quick guides based on tool kits provided to the civil society organisations by Sida at sida.se. We have prioritised definitions and critical elements needed to apply the development perspectives in trade union development projects.

We are aware that many of our partners have developed their own materials. We encourage you to refer to those and use your own methods when available.

We hope that these quick guides will help you determine whether your materials are sufficient for the project analysis needs. You are welcome to contact us at *Union to Union* for support about the development perspectives and their application.

1. Poverty perspective

This quick guide provides a definition of poverty applied within the Swedish development cooperation and suggests how this can be related to trade union development projects/programmes.

Definition

The Swedish development cooperation views poverty as multidimensional. This means that poverty is about more than a lack of material resources, it is also a lack of power, choice and human rights. The guiding principle is that economic, social and environmental conditions and processes must be understood and managed in an integrated context.

Poverty has the following dimensions:

1. **Resources. Including money, literacy, food, water and sanitation, professional skills, good health, tools or land.**

Being poor in terms of resources means not possessing and/or having access to, or power over resources that can be used to sustain a decent living standard, meet basic needs and improve one's life. Resources can be both material and non-material: a decent income or physical and human capital, such as being educated or have professional skills, being healthy, having agricultural tools or a pushcart to transport goods in towns. Resources can also be access to natural resources and ecosystem services, such as land, clean air and water, goods and services from forests, livestock and fish. It can also be having time and a social network, formal or informal. What resources a person needs and has access to or power over is context-specific and depends on variables like gender, age, etc. Resources are interlinked with the three other dimensions. For example, professional skills are linked to opportunity to find employment, access to capital and land could be linked to power and voice, and health can be related to interpersonal violence in the household.

2. **Opportunities and choice. Access to education, healthcare, infrastructure, energy, markets and information, productive employment.**

Being poor in terms of opportunities and choice concerns one's possibilities to develop and/or use resources to move out of poverty. The lack of opportunities and choice is both a consequence of poverty in the other three dimensions and a consequence of a disabling context, such as the lack of access to education, health clinics, infrastructure, energy, markets and information. Lacking resources, power and voice and living in insecurity negatively affect the choices available and opportunities to escape from poverty.

3. **Power and voice. Ability to exercise one's human rights, to articulate concerns and needs, to take part in decision-making. Requires knowledge, access to information and participation on equal terms.**

Being poor through lacking power and voice relates to people's ability to articulate their concerns, needs and rights in an informed way and to take part in decision-making affecting these concerns. This applies to decision-making in the private sphere and participation in public life and engagement with public institutions.

4. Human security. When physical, psychological or sexual violence - or threats thereof - affects life.

Being poor in terms of human security means that violence and insecurity are constraints to different individuals' and groups' possibilities to exercise their human rights and to find paths out of poverty.

Causes of poverty

A person living in multidimensional poverty is resource poor *and* poor in one or several other dimensions.

There are many underlying causes of poverty, such as weak democratic institutions, a lack of jobs, armed conflict or the effects of climate change. This context is often outside of the influence of people living in poverty, but it frames the set of choices and opportunities available to them.

While analysing the causes of poverty, the following context are considered:

- political and institutional context
- economic and social context
- environmental context
- peace and conflict context.

How do trade union development projects relate to this?

When applying for funding from *Union to Union* it is necessary to relate to the above and consider how a proposed project has an effect on the different dimensions and/or contexts of poverty and how that effect can be emphasized.

This will be straight forward in some cases, while in others, applying this perspective will be more challenging. For example, it is practically self-evident that organizing waste pickers or improving OSH in the shipbreaking industry directly improves the lives of some of the poorest in the labour market. It may not be as clear how an agreement on teleworking conditions in the banking sector or transforming a medical doctors' association from a professional association to a union has an impact on reducing poverty in that particular context. However, being well educated does not automatically imply that one is not poor. Consider the case of Lebanon where in 2021, 74 per cent of the population lived in poverty¹.

¹ <https://news.un.org/en/story/2021/09/1099102>

Applying a poverty perspective may be a question of simply explaining the link but it may also lead to reconsideration of project objectives and target groups.

Below are some thoughts on how results in *Union to Union's* programmes could relate to the dimensions of poverty.

Programme 1:

***Union to Union's* objective for this thematic area is for trade unions to be free, independent, democratic and effective in organising new members. Trade unions must pursue successful trade union work and defend and promote the human rights of their members.**

This programme concerns basic union building and in most cases *Union to Union* will have to explain at an aggregated level how strong, independent, democratic, competent unions can contribute to poverty reduction along several of the dimensions and contexts of poverty. Depending on the sector there might be cases where results have been achieved directly with the poorest segments in the formal labour market. Results concerning organizing in the informal sector will be presented in programme 3.

The dimension of power and voice and political and institutional context are important to analyse as they have direct bearing on trade union right to organise and collective bargaining.

Programme 2:

***Union to Union's* objective for this thematic area is to ensure that trade unions have the capacity to engage effectively in broad social dialogue, collective bargaining and contribute to sustainable global supply chains and a just climate transition, and that the role of social dialogue is strengthened.**

In this programme it is likely that results can be linked to most of the dimensions of poverty. It may also be relevant to address how social dialogue can affect positively several of the *contextual dimensions* that Sida identifies.

Examples:

- Campaigns and social dialogue against privatization. How does privatization affect the poor in society? It may affect access to education, health, water and sanitation etc.
- Agreements on vocational training. Depending on the group that benefit it might mean increased resources for people living in poverty in the form of professional skills.
- Agreements related to Just Transition. What are direct and indirect effects for the poor? Might they prevent people from falling into poverty as the economy is transformed?
- Advocacy and participation in the development of economic and social policies (pension plans, social security, etc.). How might it affect the poor in society even if they are not necessarily union members?

Programme 3:

***Union to Union's* objective for this thematic area is for trade union organisations to have the capacity to contribute to improved conditions for workers in the informal economy, for migrant workers and for workers who lack job security.**

This programme will likely to a large extent directly affect more marginalized segments of society in most of the dimensions of poverty,

Programme 4:

Union to Union's objective in this thematic area is for trade unions to be a leading light in promoting gender equality and combating discrimination in the workplace, in society and in their own organisations.

Sida writes in their brief on gender and poverty that:

Women and men possess different resources, or have access to, or power over, resources, that can be used to sustain or improve the standard of living. Women are more likely to be unemployed than men, with the majority of them working in the unprotected informal sector or holding part-time formal employment and earn less than men for work of equal value.²

Those are trade unions issues.

Since women generally are more affected by poverty than men and it is widely acknowledged that increased gender equality is key to reduce poverty it should be rather simple to present results under programme 4 from a poverty perspective. All dimensions of poverty can come into play. For example, work on ILO C 190 is relevant to reduce the *human security and opportunities and choice* dimensions of poverty since sexual harassment is a limiting factor to women's full and equal participation in the workplace. Supporting women to take on leadership roles in trade unions and voice their concerns both within the union and within society is a matter of increasing the power and voice of women.

In the same brief as mentioned above, Sida writes:

In many countries, being lesbian, gay, bisexual, transgender or intersex (LGBTI) means living with discrimination. The range of unequal treatment includes harassment, to being denied a job or healthcare and it can even be life-threatening. Hostility directed at LGBTI persons can also be enforced by governments through legislation or other forms of oppression. Due to the practiced discrimination, the LGBTI community have limited power and voice to change this situation and those living in poverty have even a lower chance of doing so.

Increasing awareness of this within trade unions and developing policies and structures to address it is one way that unions contribute to poverty reduction.

To conclude

Achieving and reporting results within the framework of a multidimensional poverty perspective might require some adaptations on target groups and themes to include in *Union to Union* projects. However, for the most part it is more about seeing the project through the multidimensional poverty lens and assisting us at *Union to Union* to frame the work that is

² <https://cdn.sida.se/publications/files/sida62332en-gender-equality-and-dimensions-of-poverty.pdf>

being done in a way that clarifies how the supported interventions contribute to reducing poverty.

2. Gender equality perspective

Definition

Gender equality is achieved when women and men, girls and boys, have equal rights, life prospects and opportunities, and the power to shape their own lives and contribute to society. Equality between the sexes is a question of a fair and equitable distribution of power, influence and resources in everyday life, work life and in society as a whole. A gender-equal society safeguards and makes use of every individual's experience, skills and competence.

Gender analysis highlights the differences between and among women, men, girls and boys in terms of their relative distribution of resources, opportunities, constraints and power in a given context. Performing a gender analysis allows us to develop responses that are better suited to remedy gender-based inequalities and meet the needs of different population groups.

Union to Union present this quick guide as a reference and encourages our partners to apply their own materials for gender analysis and gender mainstreaming.

Gender mainstreaming: main steps

Sida defines gender mainstreaming as the process of assessing the implications for women and men of any planned action, policy or programme, in all areas and at all levels before any decisions are made and throughout the whole project cycle. It is a strategy for making women's as well as men's concerns and experiences an integral dimension of the design, implementation, monitoring and evaluation of projects/programmes so that both women and men benefit, and inequality is not perpetuated. Gender mainstreaming is not a goal in itself but an approach for promoting gender equality.

Gender mainstreaming includes three steps:

1. ***Undertake gender analysis:*** A gender analysis must be conducted prior to any project/programme, regardless of sector or area of intervention. Any cooperation process must always begin by analysing the gender equality situation in the given context and identify the expected results in terms of strengthened gender equality.
2. ***Identify how:*** Based on the gender analysis, identify relevant objectives/activities, the approach to use and how to reach the expected results with relevance for gender equality.
3. ***Choose what approaches to apply.*** These may be implemented separately or in combination:
 - Integration of gender equality in the whole project/programme in general
 - Targeting specific groups or issues through special interventions
 - Dialogue with partners on gender sensitive issues and aspects (as part of capacity strengthening).

Key aspects of gender analysis

- Gender analysis is the starting point for gender mainstreaming. Before cooperation processes begin, any decisions are made and plans are outlined, the gender equality situation in a given context must be analysed and expected results identified.
- Norms for gender. A gender analysis includes information on women, men, girls and boys in terms of their division of labour, roles and responsibilities, access to, and control over, resources, and their relative condition and position in society. It also involves looking at other norms for how gender may be expressed, including norms relating to sexuality and identity.
- Other social variables. A gender analysis should include social variables such as ethnicity, culture, age and social class. It may also include sexual orientation.
- Quantitative and qualitative data. A gender analysis should include both quantitative (statistics) and qualitative data (analytical and relative).
- Vulnerability and empowerment. A gender analysis highlights specific vulnerabilities of women and men, girls and boys. It always has an empowerment perspective, highlighting the agency and potential for change in each group. Scope and methods vary. The scope of a gender analysis can vary and be done in different ways depending on the context.

Some examples of gender equality work in trade union development cooperation

- Separatist organisation. Trade unions or their networks may form special women's committees or committees where only women, or transgender people have the opportunity to participate. It is important that there is a reflection or exit strategy where people from these committees eventually sit in positions where the power of the unions are located, because side structures do not always change power relations.
- Education. Special skills-enhancing initiatives aimed at the underrepresented sex in order to, for example, get more women with competence in negotiation, work environment issues, association democracy, etc. However, it is important to have a norm-critical reasoning when special efforts are made for a group within the union to justify that the selection is necessary. A gender equality training can be integrated into all types of trade union education.
- Empowerment. Special self-confidence-building initiatives aimed at the underrepresented sex, daring to take their place in trade union contexts.
- Norm criticism. Special training for both women and men in norm-critical thinking and how the organization sets out the strategy for a change process. For example, all organizations can work consciously around image and word choices to avoid cementing traditional gender roles and increase the intersectional perspective.
- Evaluation. Develop studies with focus on gender that maps the union's internal gender equality work with the associated action plan. In addition, the *Union to Union* can support more comprehensive studies related to gender equality. They can be sector-specific, result-oriented, experiential or geographically motivated.
- Campaigns. Specific information and discussion campaigns to highlight power relations, discrimination and harassment within unions and in the workplace

- Influence masculinity norms. Special initiatives in gender equality for men that show how normative male roles in different countries seem limiting.
- Collaboration with other experts. By networking between different trade unions and with other social movements and institutions around gender equality issues, we all get better at this.
- Point out cemented/stereotypical gender roles in the public debate. The union can question traditionally male and female occupational categorizations that cement notions of gender in society and in the workplace. The union can also push forward on political issues related to working life and social security systems to counteract the cementing of traditional gender roles. We can also push for party politics and parliamentary composition to counter same traditional gender roles.

3. Environment and Climate Change perspective

Why should we integrate environment and climate into trade union work?

The starting point for *Union to Union* with regard to this perspective is our understanding that environmental issues such as climate change and biodiversity are closely connected to jobs and livelihoods and therefore are of a growing concern for trade unions.

Climate change and its uneven impacts are already here, and the transformation to a healthy and sustainable society needs to be planned. Preserving biodiversity and environment is the basis for many existing jobs as well as potential sources of job creation. This transformation cannot happen without an active agency from the trade union movement. It needs to be designed to generate decent and unionised jobs that are good for the environment. For this, unions need an awareness, capacity and engagement. A trade union development project is one of the tools to achieve this.

How to integrate environment and climate into a project?

The Sida's definition of *environment* includes natural resources, climate, biodiversity, and ecosystems functions and services, and encompasses aspects connected to climate change, resource depletion, environmental degradation, and pollution.

The challenges regarding the environment and climate are diverse and highly depended on the context. This diversity allows for a flexibility in approaches to integrate this perspective.

Projects/programmes supported by *Union to Union* have multiple ways to contribute:

- ***Start with an analysis*** of how your project/programme can contribute and/or can have a positive environmental impact.
- Identify impacts from climate change in your sector, and/or other environmental impacts, and include components in your project that will address those.
- Conduct a risk analysis and identify negative environmental impacts from the project/programme and address or/and minimized those.

Guiding questions for analysis

Use the following topics and questions as inspiration to guide you when preparing your project application. Not all questions need to be answered. Your analysis might lead to added objectives or specific activities.

Context

- Does the implementing partner have a knowledge of the main environmental problems and their impact in the sector and/or geographical location of the project/program?
- Have the environment/ climate issues have been taken into account when deciding on the strategies and activities of the project/program? If yes, how?
- If no, why not?

Opportunities for positive impact in your project/programme

- Does your project/programme work with occupational health and safety issues? If so, are the opportunities to use this work as an entry into issues concerning environment and climate?
- Does your project/programme include collective bargaining/negotiation of new agreements? If so, are there opportunities to include environmental clauses in the local, sectorial collective bargaining agreements or global framework agreements?
- Will the trade unions in your project engage in social dialogue related to environment and climate change?
- Is your contribution directly connected to addressing just transition and climate change? Do you partners have the necessary tools and skills to engage in these issues?

Opportunity to minimize negative environmental impact

- Are there many travels included in your project/programme? Are there possibilities to explore digital tools and platforms? Are your partners ready to operate in that way? Also include, if relevant, possible negative impacts of reducing training/meetings to digital platforms.

Analysis of risks

- Could long-term risks of climate change, or national plans to reduce emissions affect the employment in the sector you operate? For example, are there national plans that will change how the sector works with change mode of transportation, construction. Are your affiliates, partners aware of those issues? Could those changes lead to loss of jobs, are there upskilling plans in place? Are there opportunities that could be further explored? Please share and include what your affiliates and you would need to be able to proactively engage on environmental and climate change issue in your sector.
- Is your sector strongly depended on the environment? What are the risks for your sector, affiliates, workers in the sector of possible environmental degradation, climate change impacts, including occupational health and safety measures?

- Environmental, human rights and trade unions activists can and have been persecuted for being active on environmental and human rights issues. Are there risks and threats to those that stand up for climate action, sustainable global supply chains. In other words, is there a risk for your affiliates to engage on environmental issues? What support is needed?

All development perspectives are interlinked and play a role in an environment and climate analysis

Applying other development perspectives such as multidimensional poverty analysis, gender equality and conflict will contribute to a holistic understanding of the context and the partners situation and capacities. It is particularly important to always take into account that environment/climate change might affect women and men differently and that women and men have different possibilities and resources to resilience.

Capacity strengthening of unions

Use the following topics and questions as inspiration for seeing the environmental integration as part of capacity strengthening of unions:

- Do the projects partners/affiliates have internal climate change or environmental policies?
- Do the projects partners/affiliates have congress decision related to the issue? Or are there plans under development? Please share.
- Do you have internal courses or training on the issue? Are the projects partners/affiliates engaged in national or international (multilateral) climate or other environmental negotiations?
- Could emissions from transport be reduced? Are there strategies to reduce emissions from energy use at the offices - share for example if you have plans, possible challenges for affiliates, other examples.

4. Conflict Perspective

How do trade union development projects relate to this?

A complete conflict analysis and understanding of the local/regional situation is essential when it comes to understanding whether an ongoing violent conflict or a submerged conflict/tensions may affect a trade union development project.

The conflict analysis in short is about having a good knowledge about the context where a project will be implemented. Key questions are how contextual factors affect the implementation of a project and how the project can intentionally or unintentionally affect the conflict situation.

It is also important to make a distinction between working **in** conflict (any project planned and implemented in any phase of the conflict) and working **on** conflict (i.e. activities aimed at contributing to peace and security).

What is conflict?

A conflict is a disagreement between two or more individuals or groups. Conflicts are a natural part of every society and can be positive as long as they are managed constructively. A conflict becomes violent when one or several parties seek to attain their goals with destructive means and resort to violence or threat of violence in one form or another.

Working in conflict requires risk awareness and conflict sensitivity:

1. Risk awareness – how the conflict situation affects the trade union development project
2. Conflict sensitivity – the ability of a project partner to understand how the project may affect the conflict situation, and how to minimise potential negative impacts and maximise positive impacts on conflict dynamics, within a partner's given priorities/objectives.

Conflict insensitive development cooperation risks reinforcing tensions or conflict, while conflict sensitive development cooperation can contribute to strengthening local capacities for peace.

Conflict Prevention

Peacebuilding and conflict prevention are overlapping concepts and processes. Conflict prevention does not only refer to preventing the outbreak of conflict, but also resolving or preventing a relapse into conflict. Theory and evidence, however, suggest that structural prevention is most effective in the early (or latent) stages of the conflict.

Working on conflict requires an additional depth of analysis to:

3. Promote peace and security – understand and address root causes of violence and conflict and including conflict prevention, peace and human security as a primary or secondary objective. It is key to understand that also development initiatives specifically designed to promote human security or build peace can negatively affect the conflict situation. It all depends on how the initiatives are designed and implemented. It is therefore important that such initiatives also apply a conflict sensitive approach.

Examples of specific issues to analyse while applying the conflict perspective to project work:

- Where the partners will implement the project, and how does that choice relate to identified conflict risks and opportunities?
- Does the implementing partner have a documented analysis of power dynamics, root causes, drivers of conflict (sources of tension) and drivers of peace (sources of cohesion)?
- Do local partners and/or target groups represent different sides of the conflict or has a strategic choice to support a specific group in the conflict been made?
- Are the positive and potential negative implications of these choices reflected upon?
- Are opportunities to contribute to conflict prevention and peacebuilding identified?
- Is there a clear connection to project problem description and objectives based on conclusions from conflict analysis?

All development perspectives and interlinked and play a role in a conflict analysis

Applying other development perspectives such as multidimensional poverty analysis, gender equality and environment/climate will contribute to a holistic understanding of the context and the partners situation. It is particularly important to always take into account that a conflict might affect women and men differently and that women and men have different possibilities and resources to contribute to sustained peace.

Some examples of project objectives

A trade union regional project in a situation where the implementing partners are directly affected, might aim at strengthening the unity of action in order to more efficiently withstand attempts to reduce labour rights. These projects can also aim at the direct protection of workers and their organisations from the consequences of the direct violence which is part of the conflict.

Union projects in post-conflict situations might include project objectives such as an establishment of justice and reparation for groups of workers, union leaders and related parties, who have been affected by the conflict, and consequently implement activities that protect the workers affected by the illegal armed groups that continue to be active. Also, if a project wants to influence a post-conflict stage, to improve the working and safety conditions of sectors of workers who have been seriously affected in their rights, after an armed conflict.

To conclude

In the narrative application, if the partners will work in countries/regions with ongoing/submerged violent conflicts and in a post-conflict situation, the conflict perspective must guide:

- Understanding the context
- Undertaking conflict analysis and make sure to update the analysis on a regular basis
- Understanding the interaction between the project and the context
- Linking this analysis to the project context and to the different stages of project planning, implementing and evaluation
- Identifying, assessing, mitigating, managing and monitoring risks (from a Do-No-Harm perspective)
- Identifying/taking opportunities to support positive change in society (in attitudes, behaviours, relations, etc.).

5. Human rights-based approach

Definition

A Human Rights Based Approach (HRBA) is a normative working methodology based on internationally recognised human rights. It

- aims to promote, protect and fulfil human rights and democracy in practice

- integrates the norms, standards and principles of international human rights law into plans and processes of development programmes
- applies to all sectors, all modalities, and each step of the programme cycle

Within the framework of an HRBA, target groups are considered rights-holders with legal entitlements. Government institutions are duty-bearers. These duty-bearers are under an obligation to realise human rights for all according to the UN Universal Declaration of Human Rights and the human rights conventions. Applying an HRBA to development cooperation aims at empowering rights-holders to claim their rights and duty-bearers to meet their obligations in line with international human rights law.³

How do trade union development projects relate to this?

Projects need to assess the capacities of rights-holders and duty-bearers and to develop appropriate strategies to build these capacities. At the heart of a Human Rights Based Approach is the recognition that unequal power relations and social exclusion deny people their human rights and keep them in poverty. The approach therefore puts strong emphasis on marginalised and discriminated groups.

In planning, implementation, monitoring and evaluation of projects a Human Rights Based Approach needs to be applied. That this is so can be ensured by taking into account the following questions:

Participation in and access to the decision-making process:

- Is there active and meaningful participation of rights holders? Are there opportunities for rights holders to influence the formulation of problems, planning, implementation and follow-up of the intervention?
- Is there active and meaningful participation of those involved – including opportunities for them to influence the formulation of problems, planning, implementation and follow-up?

Links to human rights:

- How are human rights standards from treaties, laws and recommendations used to define and advance the intended project and programme outcomes (or how could they be)?
- How is information from monitoring mechanisms and reviews used to define and advance the intended project and programme outcomes?

Accountability:

- Who are the duty bearers?
-

³ <https://www.sida.se/en/for-partners/methods-materials/human-rights-based-approach>

- Do the duty bearers have the knowledge, mandate, resources and willingness to achieve their human rights obligations?
- Do rights holders know who the duty-bearers are and can they hold them to account?

Non-discrimination:

- Who are the rights holders?
- Have they been taken into account in the design of the contribution?
- Are people in vulnerable situations considered?
- Is discrimination actively counteracted?
 - Projects and programmes should prioritise the most marginalised groups and must avoid contributing to established patterns of discrimination.

Transparency:

- Is information about the intervention available in an accessible way to all stakeholders?
- Are rights holders able to attend and observe meetings and processes where issues that affect them are discussed?
- Can the intervention strengthen or institutionalise transparency in the relation between duty bearers and rights holders in a sustainable way?

To conclude

Trade unions' work is based on the rights to organise and to collective bargaining and the main mechanism to achieve change is through a social dialogue which is one of the essential human rights-based, democratic mechanisms in a society. However, within the frames of each individual trade union development project/programme, HRBA perspective brings clarity to objectives, the choice of target groups and approaches.