

## Övergripande verksamhetsplan för 2018–2022 med fokus på 2020

Forum Syd har en övergripande femårig verksamhetsplan som uppdateras årligen och antas av årsmötet. Fokus i verksamhetsplanerna ligger på nästkommande år, så denna verksamhetsplan fokuserar på 2020.

Arbetet med den bifogade verksamhetsplanen har utgått från föregående års verksamhetsplan och har uppdaterats efter diskussioner i Forum Syds styrelse och globala ledningsgrupp. Styrelsen och ledningsgruppen har framför allt diskuterat prioriteringarna för 2020 men även dokumentet i sin helhet. Styrelsen har slutligen beslutat om denna version som det nu är upp till årsmötet att anta.

De huvudsakliga uppdateringarna återfinns i avsnitten ”Present situation”, ”Priorities” och ”Financial Consequences”. De strategiska målen som antogs vid det förra årsmötet gäller för 2018–2022 och är därmed oförändrade i denna version av verksamhetsplanen.

### **Styrelsen föreslår årsmötet besluta**

**att** anta bifogad verksamhetsplan inklusive rambudget för 2018– 2022 med fokus på 2020

# Forum Syd

## Overall Plan for Operations 2018–2022

2020

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# ***1 Vision and purpose***

## *Our vision*

A just and sustainable world where all people have the power to effect change.

## *Purpose*

We strive to achieve our vision by:

- strengthening marginalised people around the world who organise to claim their rights.
- advocating for changes that contribute to a just and sustainable world.

## **2 Present situation**

*Where are we today and why? What does the future hold? What insights have we gained? How is Forum Syd doing?*

### **External environment**

*Human rights and democracy*

### **External environment**

*Human rights and democracy*

The world today is in many ways characterised by contrasts. Amidst increasing turbulence politically, socially, economically and environmentally, we see civil acts by individuals and groups, questioning existing power structures and demanding that those who are in power use their positions to stand up for human rights and democracy.

In recent years we have seen nationalism on the rise across the globe, and the election of leaders who do not hold the bar high on issues such as human rights, environmental protection or gender equality. Despite progress regarding women driving in Saudi Arabia, the country does not fare well when it comes to democracy or human rights. The change in political leadership in Colombia meant a shift in commitment to the peace agreement of 2016, made between the government and the FARC guerrilla. Instability on the border between India and Pakistan, two nuclear states, increased the same week that the president of the USA met the leader of North Korea to discuss disarmament of the latter. Two Burmese journalists received international attention as they were detained for reporting on the Rohingya crisis, while internet censorship and surveillance in China reached new heights as a cyber security law came into effect in 2017. People using blogs and social media for advocating human rights or for critical commentary have been arrested or sentenced to prison. Increasing social gaps, extreme weathers of both heat and cold, and the extinction of the Northern White Rhinoceros is combined with greater distrust in institutions, while the internet and social media is used to spew hateful rhetoric resulting in a social contract hanging loose.

Freedom House, an independent watchdog organisation dedicated to the expansion of freedom and democracy, points to “peaceful activism” as a tool that can be used to affect governments and enable a more open civic space. Looking back at 2018 and the first months of 2019, we see several examples of how people have come together to address issues that affect both themselves and others. We see people engaging and organising to create change in both stable democracies and in authoritarian regimes. A 16-year old girl has given young people across the world a way of engaging in climate change issues with her school strike. Greta Thunberg has been invited to high-level meetings to meet world leaders and she bluntly states that stopping the speed of climate change is up to them. Young people all over the USA began mass protesting against gun violence, women in Saudi Arabia were allowed to drive and women in India formed a 620km long human chain to protest a ban that forbids women to enter a Hindu temple. Two champions of women’s

rights were awarded the Nobel Peace Prize 2018 “for their efforts to end the use of sexual violence as a weapon of war and armed conflict”.

Democracy and respect for human rights are crucial for sustainable development and civil society is one of the most crucial actors to bring change in society. This strength that civil society holds is perceived as a threat by authoritarian regimes: human rights and civic freedoms are increasingly restricted and democratic space is shrinking. Governments, but also other actors such as militias, companies and organised criminal groups, use a variety of methods to silence and suppress civil society groups defending their rights. Swedish civil society involved in Swedish development cooperation, is key in order for the development cooperation to continue focusing on strengthening civil society and measures to counteract the shrinking democratic civic space through concrete actions.

### *Shrinking space for civil society*

Civic space around the world is diminishing, both in authoritarian and non-democratic countries as well as in countries that have traditionally been defenders of democracy and human rights. It has become increasingly dangerous to challenge governmental power structures and the levels and types of restrictions passed on organisations have increased, detrimental to their ability to function. A multitude of reports show how environmental activists, women’s rights advocators and human rights activist are putting their life at risk when operating in such environments. Front Line Defenders report an increase in killings of human rights defenders in 2018 to 321 persons in 27 countries. A local partner to Forum Syd in Colombia, ANZORC, had twenty of their social leaders killed in the last 2 years, highlighting the pressure that civil society is under.

Freedom of expression is also under attack, both for established media- and press organisations, journalists as well as individual citizens. *The Freedom House report Freedom in the World* data shows freedom of expression declining each year over the last 13 years, with sharper drops since 2012. Despite some positive changes in relation to civil society in Belarus, the law of media has changed, so that individuals must now be registered with a full name in order to comment on state news. According to the CIVICUS Monitor, only 4 % of the world’s population live in countries deemed open societies. Serious threats to civil society have been observed in 111 of the 196 countries included in the Monitor.

Civil society is changing as a result of both external and internal pressure. In Cambodia, administrative laws are effectively used to make it difficult for the small civil society organisations that Forum Syd supports to operate. New ways and methods of mobilising and organising oneself are becoming visible, and we see new types of movements and networks take shape in less formal ways and structure themselves differently to circumvent administrative and legislative obstacles. Social media platforms are a way to reach out broadly and organise through, and other tools pop up to help civil society adapt to its changing environment.

Forum Syd, as a platform for the civil society, must be up to date and follow the how people in the world are organising and mobilising in order to see new ways of strengthening the bond between each other. Local civil society organisations will be imperative to the donor community when it comes to providing knowledge

on how they deal with the restrictions they are facing. Efforts to create enabling solutions must be based on these experiences, and platforms such as Forum Syd can play a crucial role in disseminating best practices among local organisations.

### *The 2030 Agenda for sustainable development*

Independent and effective civil society organisations can and should play a vital role in realising the 2030 Agenda. This includes localising the SDGs, protecting rights, promoting accountability and providing valuable monitoring functions. Sweden has taken a lead on implementing the 2030 Agenda and the commitment was reconfirmed in the Government declaration in January 2019. The government has appointed an independent committee (Delegationen för Agenda 2030) with the aim of promoting, facilitating and stimulating the work with the Agenda. The committee has submitted its final report in March 2019, pointing out areas which requires the most focus in the coming years in order to push the work forward.

In 2018 the Swedish government launched an action plan for the work with Agenda 2030. The action plan is built on the proposal presented by the Delegation for the 2030 Agenda in June 2017. The action plan focuses on six new areas: equality and gender equality, a sustainable society, a socially beneficial, circular and bio-based economy, a strong business sector with sustainable business, a sustainable and healthy food chain, as well as knowledge and innovation. One of the main ideas with the action plan is to create and encourage a partnership between the public sector, civil society, business and information society.

There is a need to continue to monitor and hold decision-makers accountable for commitments made and to advocate for further commitments in order to reach the global goals. Forum Syd's advocacy work focuses on the global perspective and the external effects of Swedish policies. This focus is chosen since addressing issues where Swedish policies have a global impact, or where there are conflicts of interest between different policy areas, is crucial in order to achieve the 2030 Agenda.

### *Development policy*

In 2016, the OECD Development Assistance Committee widened their definition of development assistance (ODA), so that ODA now could include costs related to peace and security, and military measures. The new definition also strengthens the role of private sector engagement in development. It also blurs the line between what is considered to be ODA and what is not, which is a disadvantage for civil society organisations working with development and in a long-term perspective as it will mostly affect the poorest and those living under marginalised conditions.

The changes in funding, in terms of trends and priorities could lead to a shift in relevance of actors. The EU is one of the major actors in development cooperation and is becoming increasingly important for us. Decisions at EU-level are therefore very important for civil society organisations in Sweden. Today, a visible and worrying aspect is the increased EU focus on economic interests, migration and security.

Therefore, the European Parliament election in May 2019 could have a great impact of how EU will target development cooperation. The Multiannual Financial Framework (long-term budget) of the EU, will be negotiated in 2019 and the outcome will steer EU as a development actor 2021-2017. Civil society organisations should be present during election questioning and monitoring of decision-makers and raise awareness of issues related to sustainable development, poverty and human rights.

The governments priorities visible in the budget allocations, the framework of Swedish development cooperation, the strategy for civil society support as well as guidelines provided by Sida are factors of highest importance and determines Forum Syd's work. In recent years there has been cuts in the Swedish aid budget allocated to cover in-donor refugee cost. These deductions do not contribute to the overall objective of Swedish development cooperation. Making cuts from the aid budget to cover in-donor refugee costs is placing people living under marginalised conditions against each other and will in the long-term not be effective for sustainable development. The rules for deductions have been clarified by the OECD DAC and the Swedish government has agreed on a new model for calculating in-donor refugee costs, which will be presented in the budget bill in April.

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## **Internal factors**

The main internal factor affecting Forum Syd continues to be the internal organisational change project, Going Glocal. The new matrix organisation came into effect on January 1<sup>st</sup> 2017, and with it came the issue of increasingly complex processes – as we work cross-sectionally and globally to a higher extent than previously. Relevant and important work in this regard has been done, but there is still a need to address both processes and systems due to the new organisation. In addition to this, there are further aspects of Going Glocal, interpreted into our strategic goals, which need focus as well. Decentralisation of certain tasks is one thing – becoming a global organisation that is a platform for civil society is another thing.

As a result of Going Glocal, Forum Syd faced a period of high staff turnover. This has now returned to healthy levels. An employee survey conducted in 2018 shows that there is still work to be done to improve Forum Syd as a workplace. With the appointment of the new Secretary General and Deputy Secretary General, there is a strong commitment among the management to ensure that Forum Syd is one organisation and to address the recent changes with renewed energy. Most of the work will continue according to plans already made, while some areas will be looked over again with the learning from the change process so far.

The internal working groups, global teams, are a mechanism for Forum Syd in becoming a global organisation. The Global Teams are responsible for certain areas of work, and bring together staff from functional units, hubs and country offices. They have proven to be a way to get new perspectives across and visible in the organisation, as well as a place where innovative working methods grow.

Becoming a platform for civil society is key for Forum Syd. In 2018 a member recruitment project was run, which led to higher numbers of new members. Towards the end of the year, the Board instituted a Member Working Group which will be an important complement to the work already being done in improving the membership value of Forum Syd. Civil society is under attack in many places in the world and Forum Syd addresses that. This is done partly by considering how new ways of organising to meet or mitigate the attacks can affect our work, and partly by working strategically with issues of safety, security and protection.

Forum Syd will continue working proactively with anti-corruption and internal control. In 2019, Sida will conduct an efficiency audit of Forum Syd and the results from this audit will play a great role in how Forum Syd will continue to improve the organisation. Guidelines and steering documents for financial management and internal control will continue to be developed. We will continuously ensure a good control environment in the entire organisation.

### **3 Success factors**

*Within our Purpose, what will we focus on in order to be appreciated and successful?*

- **Competence**
  - Theory of change drives all our work
  - Effective development cooperation methods
  - Being a skilled advocate
  - Demonstrating lasting results
  - Direct contextual knowledge through local presence
  - Member organisations with extensive knowledge of development perspectives and cooperation
  - Bottom-up perspective on development
  - Innovative and flexible towards change
  - Being an excellent employer attracting highly skilled staff
  
- **Simplicity**
  - Being a straightforward partner to work with for applying organisations, local partners, and donors
  - Focus on simplicity and cost-effectiveness in all our internal processes
  - Clarity and transparency in what we stand for and everything we do
  - Complex messages expressed simply
  
- **Presence**
  - Having a presence in tough or challenging places and working with grassroots organisations
  - Making use of our presence in strategic regions
  - Advocate and be an influential voice within development cooperation
  - Credibility in our way of working with partners – being a receptive, active partner that operates on equal terms

## 4 Goals

Forum Syd has five goals for the period 2018–2022, which together contribute to fulfilling our purpose.

### *Strategic goals*

<b>Strategic goal</b>	<b>Where we are in 2022:</b>
<b>Strong through our diversity</b>	Forum Syd is recognised by members and other stakeholders as an important platform for civil society. We do this by making visible the work of the many diverse organisations with which we work, without thematic or geographical limitations. We are an influential voice in development cooperation championing the role of civil society in promoting democracy and fulfilling human rights.
<b>Effective and credible</b>	Through a rights based approach, guiding our Theory of Change, we achieve high impact. We are recognised by donors and partners to be a reliable and straightforward organisation to work with.
<b>Continuous improvement</b>	Our processes are clearly defined, efficient and fully implemented. Leadership is clear and all decisions are guided by our purpose. We have improved results and increased the potential for synergies by innovating and by coordinating between organisational units, with our members, and through strategic partnerships.
<b>Close to where the change takes place</b>	In order to benefit from contextual knowledge, competence and opportunities, we are present close to where the change takes place.
<b>Financially sustainable</b>	Our financial sustainability is strengthened through diversified funding.

*Forum Syd's goal structure*



## **5 Priorities**

*What will we do in order to reach our goals?*

**CELEBRATING 25 YEARS OF DEFENDING RIGHTS** | 2020 marks 25 years for us of strengthening people living under marginalised conditions and advocating for changes that contribute to a just and sustainable world. Together with our diverse and dedicated members and local partners, we have collectively contributed to this. Throughout the year will highlight the value, importance and strengths of civil society in ensuring democratic development and access to rights in our celebrations with members and partners.

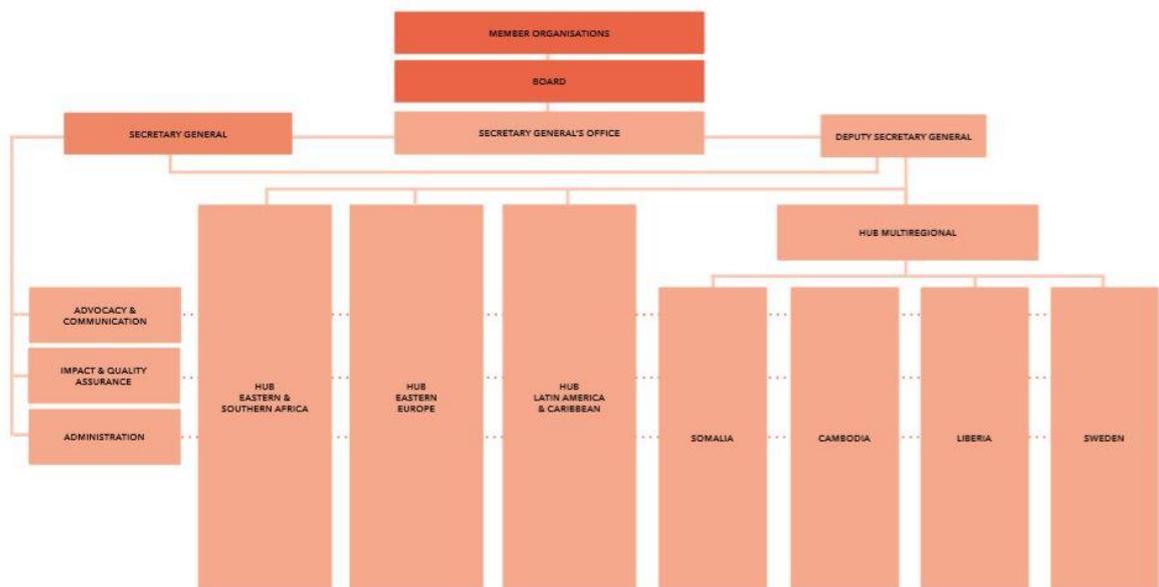
**CONSOLIDATE THE STRATEGIC HUBS** | We will work to ensure that the potential of hubs in Forum Syd is fully utilised and strengthen the added value of the strategic hubs to Forum Syd, members and other stakeholders. We will examine how we can structure our internal operations to clarify issues of regionality, expectations, resources and mandate.

**ENHANCE THE INTERNAL ORGANISATION** | We will assess the re-organisation so far and continue making necessary adjustments. This will include examining the whole organisation; clarifying the four roles of Forum Syd, strengthening our work with safety, security and protection, potential expansion and work to provide a good workplace that develops, maintains and motivates staff.

**STRATEGIC APPROACH TO FUNDRAISING** | Building on preparatory work from 2019, 2020 will see us begin implementing our fundraising strategy, with localised plans developed for hubs and country offices.

## 6 Organisation

Below is an organigram of Forum Syd, valid from 2018-11-01.



Our organisational structure aims to promote coordination and cooperation between units and Global Teams are used to a great extent. The management team is global and includes Heads of Units and Hubs. This helps in ensuring that the global organisation is considered at all times, and benefits from different perspectives from within the organisation.

## **7 Financial consequences**

*What revenues, costs and investments do we expect? What are our financing needs and how can we satisfy them?*

Financial scenarios and priorities

The Plan for Operations 2020 foresees a budget frame of 404-417 MSEK.

The financial scenario on which we base our planning is dependent on the development of the volume of the pending contracts for funds related programs with direct support to local organisations from several donors (for example by EU and other Sida departments). Many of the direct support programmes (programmes where funding and/or other types of development cooperation is provided directly to local partners) run on short term agreements. This means that multi-year forecasts are unreliable. The forecast below is to be interpreted as a rough estimate and ambition for the coming years.

In 2018 three new direct support program agreements were signed. In Hub Eastern and Southern Africa one program running 2018-2021 and one long-term programme with annual agreements (one year 1 included in the budget below), and one agreement for Country Office Liberia for 2018- 2021. The framework agreements with Sida Civsam for South/East and with Sida Partnership Forum for the information grant are approved for 2018-2022. An EU funded program was recently signed for Hub Latin America and the Caribbean, spanning 2019-2020. This increases the financial stability of Forum Syd as a whole.

However, we see a potential for further growth during 2018-22, in the global South and East, focusing on grants to:

- diaspora programs,
- programs in conflict and post-conflict areas,
- programs in countries where civil society is under pressure.

Programme applications covering all these areas are planned or already submitted.

## Budget Frame

Type	outcome 2018	2019	2020	2021	2022
Communication programmes (Globalportalen and Global Development Issues) Sida Partnership and Swedish network for Eastern partnership programs, Sida Europa	5	6 (5)	5 (4)	5 (4)	5 (4)
Direct support to local organisations, various donors	59	119 (108)	119 (38)	119 (24)	119 (0)
Sub-granting to Swedish CSOs. Includes Sida Civsam and Sida Partnership grants and the grant from Swedish Council for Higher Education (one year contract).	244	238 (238)	240 (232)	242 (234)	257 (249)
Forum Syd's costs for administration, quality assurance and Capacity development	43	54 (53)	52 (43)	52 (42)	52 (41)
<b>Total per year</b>	<b>351</b>	<b>417 (404)</b>	<b>416 (317)</b>	<b>418 (304)</b>	<b>433 (294)</b>

1. The table shows the range between a realistic forecast and the funding with a signed agreement (in parenthesis)
2. Includes carry over from 2018

These costs will mainly be financed through funding from:

- Sida (different departments and embassies)
- Sida Civsam
- Sida Partnership Forum
- Swedish Council for Higher Education
- EU
- Membership fees Forum Syd
- Membership fees & sales from Globalportalen

## **8 Follow up**

**Interim reports:** In relation to the detailed Plan for Operations developed by the Forum Syd staff, we follow-up activities at all levels, with a focus on deviations from plan.

**Annual reports:** The annual reports follow-up the Plan for Operations at all levels and focuses especially on analysing the fulfilment of strategic goals and priorities. Goals are followed up using key indicators. Indicators for the strategic goals 2018–2022 were decided by the Board in the beginning of 2018 and a baseline will be developed during the year. These are followed-up by the Annual meeting, through the Annual Administrative Report. In addition to key indicators and the analysis of development results, Forum Syd complements its follow-up system with specific evaluations.

The Overall Plan for Operations is revised annually under the direction of the Board and is approved by the Annual Meeting.