CENTRE FOR CO-OPERATION WITH NON-MEMBERS

OECD GLOBAL FORUMS - GUIDANCE FOR BEST PRACTICE

Cancels & replaces the same document of 28 November 2008
The purpose of this guidance is to ensure that the Global Forums fulfil in an optimal manner their dual function as a tool for stable networking and for helping Committees to deliver their outputs. It has been developed in consultation with OECD Directorates. It serves as a reference tool for those in charge of managing the Global Forums.

This guidance will be updated regularly to take account of the ideas and insights put forward by Delegates and members of the Secretariat, who are encouraged to use this guidance as an instrument for sharing their best practices.

This guidance does not create new formal obligations besides those included in the Council decisions on the Global Forums.

Mission Statements
- Committees that wish to launch a Global Forum are expected to formulate a mission statement for this Forum. Together with this mission statement the lead Committee (and co-lead Committees if relevant) should be identified. The mission statement should summarise the Global Forum’s expected contributions to the work of this Committee (or these Committees). Such a mission statement should preferably be in “bullet point” format.
- The aims and objectives of the Global Forums are stated in the box below.

Box 1. – Aims and Objectives of the OECD Global Forums
- The Forums should constitute stable networks of Member and non-Member policy makers;
- They should treat global issues, i.e. those issues that defy solution in individual countries and regions;
- These issues should be those on which the OECD is an important player, if not a leader, and should be the subject of peer learning;
- Forum activities should be characterised by a clear focus and medium-term continuity;
- They should have enough flexibility to cope with evolving circumstances;
- There should be appropriate monitoring and evaluation mechanisms;
- The Forums should develop name recognition outside the OECD as vehicles for international cooperation on specific subjects;
- Support by a Committee is essential.

Branding
- Committees should regard and treat their Global Forums as the principal brand name for their global relations, after observership. They should make sure it is recognised as such by offering a product that is of high quality and unique and giving non-members a stake in its success.
- The term “(OECD) Global Forum” is reserved exclusively for use by the Global Forums that have been launched according to the process described below. It should not be used to denote individual meetings.
- The use of convoluted titles that are hard to remember should be avoided.
In principle, there will be little reason for Global Forums to meet behind closed doors and inviting the media as observers, especially to the opening and closing statements, can promote their branding.

It is also useful to create a designated Website for each Global Forum, with links to the sites of the relevant Committee and instruments, and to make documents presented at Global Forum meetings available through this Website.

**Function and Status of the Global Forums**

- One of the principal outcomes of the 2007-08 review is that functional links will be established between the Global Forums and the Committees.

- A Global Forum should be regarded as a network or community of stakeholders that meets under the aegis of a Committee. It does not have the status of an official OECD body. Its principal functions will be to help the Committee to identify relevant issues (including 'next generation issues'), to promote a convergence of views on its output results among a broad range of non-members and other stakeholders, to ensure that these output results are known and used among these stakeholders and to share best practices in the implementation of the results.

- Global Forums, involving a broad range of other stakeholders than members and observers, do not take decisions and do not deliver final output results.

**Launch of a Global Forum**

- Committees will initiate the launch of a Global Forum. The ERC will be informed and its Delegates will have the possibility to intervene within 15 days.

- A Global Forums should only be launched if its longer-term relevance and viability, including its financial viability (see under “funding”, below) can be reasonably assumed.

- It is possible for two or even more Committees to assume joint responsibility for a single Global Forum if the continuous involvement of both Committees can be ensured in the longer run. It is also possible for two or more Global Forums to be associated with a single Committee, provided that each of these Forums has longer term viability and their areas of work are clearly distinct. Finally, two Global Forums can organise joint meetings, even on an ad hoc basis.

- The expiration date of each Global Forum will be the same as that of the Committee with which it is associated, unless there is a specific reason for an earlier date.

**Participation in Global Forums**

- Accession candidates (A5) and Enhanced Engagement partners (EE5) are expected to join more and more Committees as members (A5) or observers (EE5). As a result, Committees’ capacity to accommodate other non-members as observers is bound to become very limited over the coming years. The Global Forums’ primary function is to provide an alternative way for the Committees (including the observers) to engage with these other non-members on a regular basis. If these other non-members are of lasting importance for the Committee’s agenda, they may be invited as Designated Participant in the Global Forums.

- Designated Participants will be approved for an indefinite period, until revocation. They will have an automatic right to be invited to all Global Forum meetings and they should be expected to attend. There will be no fee involved. It is important that the status of Designated Participant in a Global Forum can be presented as a worthy alternative to observership in the Committee. This is
why their numbers should be limited and a reason to give Designated Participants prominent functions in the Global Forums meeting agendas. Committees should not propose Designated Participants by the dozens, but should propose some.

- Full Participants and Regular Observers in Committees will be Designated Participants in the corresponding Global Forums, unless there is a specific reason for not doing so. The same is true for accession countries and Enhanced Engagement partners. Furthermore, Committees are encouraged to be favourably disposed to making non-Members in regions of strategic interest designated participants.

- Committees are expected to develop a policy to determine who they see as the principal stakeholders and propose a list of Designated Participants on that basis. The ERC should be informed via its EDG, giving ERC Delegates 15 days to intervene.

- Other non-Members, international organisations and persons can be invited to Global Forum events on an ad hoc basis at the Secretariat’s discretion. However, Committees should be informed in advance of which non-members will be invited. Committees may use their EDGs for this purpose or any other means they agree on.

Stable Network Function

- The Global Forums are expected to be brand names for stable networks of Member and non-Member policy makers. Committees and the Secretariat have various means at their disposal to help ensure that the Forums fulfil this function and entice participants to return to future meetings, notably the agendas, the venues, the participants and the meeting format.

- Agendas for Global Forum meetings should ensure that the Forums help Committees to achieve their expected outcomes. Committees are encouraged to formulate longer-term agendas for their Global Forums reflecting the contribution which the Forums are expected to make to the expected outcomes and outputs of the Committees with which they are associated.

- The meeting venues should be chosen so as to ensure a large turnout of member country representatives. Organising meetings back-to-back with Committee meetings can be helpful in this respect. It is advisable to use the OECD Headquarters as the default venue, but exceptions may be made if justified by the subjects treated or other compelling reasons (e.g. funding, involvement of another organisation, regional visibility or local partnerships).

- Besides member participants, it is advisable to create a core constituency of non-member participants. This can be done i.a. by using the Designated Participant option to this effect, and by giving non-member experts speaking slots or other designated functions.

- The Secretariat is encouraged to pay more attention than in the past to the need for an adequate gender balance and representation of non-governmental actors when inviting individual participants and assigning functions in the Global Forum meetings.

- Seating arrangements should be conducive of a lively exchange of views. In this respect, theatre seating, with a panel seated on a stage and an audience whose tasks is limited to asking some questions, is usually not ideal. There could be exceptions, e.g. for plenary sessions where the number of participants is very large, but in this case it may be advisable to organise break-out sessions, with the “boardroom seating” that Committees use.

- Informal contacts are an important part of the networking function of a Global Forum meeting. It is advisable that agendas leave sufficient time for this, e.g. by adding tea and coffee breaks, lunch sessions or receptions.
- To promote the continuity of a Global Forum and ensure it supports the Committee’s agenda, the Committee may designate its chair or a member of its bureau as the chair of the Global Forum. It is advisable that the Committee bureau is equally involved in the agenda setting of the Global Forum as in that of the Committee.

**Funding**

- Committees should be aware that a decision to launch a Global Forum presumes that they are willing to continue proposing the required funding to Council over a longer term. This should include a critical mass of part I funding, or at least commitments by donors to provide longer-term voluntary funding.

- As a rule, Designated Participants are expected to attend all Global Forum meetings and to be willing to fund their own participation. Exceptions could be made if the participant is a lower-income country. The World Bank currently provides annual grants to help fund the participation of developing countries in some Global Forums; similar arrangements could be conceived with regional development banks or other donors.

**Assessments**

- The Global Forums will be evaluated through the regular PIR exercise (in which some non-Members participate), but only indirectly, since the Forums do not produce final output results. The Global Forums can be evaluated more directly as a standard element of the in-depth evaluations of Committees, in which non-Member participants’ views should be taken into account. Other stakeholders than those polled in the context of the PIR process could be involved through reference groups of Global Forum participants which Committees could set up to provide regular feedback on an informal basis to assist them in assessing their Global Forums.

- The distribution of “tick box” questionnaires among participants as a standard feature for the Forums could be considered, but its value as an instrument for measuring impact has generally proven to be limited.