



THE ROYAL NORWEGIAN MINISTRY  
OF DEVELOPMENT COOPERATION

# Evaluation Report 1A.85



**TRADE  
UNION  
TRAINING**

**FINANCED UNDER THE  
LO — NORAD FRAMEWORK  
AGREEMENT 1980 — 1985**

**A REPORT  
PREPARED FOR THE ROYAL NORWEGIAN  
MINISTRY OF DEVELOPMENT COOPERATION  
BY  
AN INDEPENDENT EVALUATION TEAM  
HEADED BY  
PROFESSOR EINAR THORSRUD**



This issue of the Evaluation Report Series is dedicated to the memory of Professor Einar Thorsrud. His participation in this evaluation exercise was one of his last contributions to the cause of making work life better and more meaningful.



EVALUATION OF  
TRADE UNION TRAINING

FINANCED UNDER THE LO - NORAD  
FRAMEWORK AGREEMENT 1980-85

BY

EINAR THORSRUD, TEAM LEADER  
ALAN LEATHER, SECRETARY  
NITISH R. DE  
BRITHA MIKKELSEN  
KETIL NORDAHL  
HELGA TRULSRUD

THE VIEWS AND INTERPRETATIONS EXPRESSED IN THIS REPORT  
ARE THOSE OF THE AUTHORS AND SHOULD NOT BE ATTRIBUTED  
TO THE MINISTRY OF DEVELOPMENT COOPERATION.



## CONTENTS

---

	Page
1. Introduction, with summary of main recommendations	1
2. The NORAD-LO framework agreement	11
3. <u>Malaysia</u> : profile of economy, political background, and trade union situation	27
3.1 Training for women trade unionists/SE Asia (1981-82/NOR/W/1 and 1983/NOR/W/1)	34
3.2 Employment promotion programmes with national unions/Asia (1983/NOR/AS/11)	47
3.3 Viking Project (881/LO/3-5/84)	55
4. <u>Indonesia</u> : a profile of economy, political background and trade union situation	61
4.1 Training for women trade unionists/SE Asia (1981-82/NOR/W/1 and 1983/NOR/W/1)	66
4.2 Employment promotion programmes with national unions/Asia (1983/NOR/AS/11)	74
4.3 Trade union training (1980/NOR/AS/III and 1983-84/NOR/AS/VII)	79
5. <u>Jamaica</u> : profile of economy, political background and trade union situation	87
Joint Trade Union Research Development Centre (JTURDC 888/J/O)	
5.1 Historical background	92
5.2 Education programme	94





5.3	Research programme	108
5.4	Communications programme	114
5.5	General observations	116
6.	<u>Zimbabwe</u> : profile of economy, political background and trade union situation	123
6.1	Organisational campaign, leather workers (1982/NOR/ITS/VI)	129
6.2	Labour College (1983/NOR/AFR/III)	134
6.3	Courses for women trade unionists (1983/NOR/W/III)	141
6.4	Seminars in Norway and Brussels for trade unionists from Zimbabwe (1983/NOR/W/III)	146
6.5	Seminars in Norway for trade union organisers from Southern Africa (881/LO/3-4/84)	155
7.	<u>Botswana</u> : profile of economy, political background and trade union situation	159
7.1	Migrant labour training (1983/NOR/AFR/II)	164
8.	The International Trade Union School, Sørmarka	179
9.	Conclusions and recommendations	189

#### Appendices

- I. The LO-NORAD Framework Agreement
- II. Terms of reference of the evaluation
- III. Lists of contacts
- IV. Bibliography

Report editor: Susan Bullock



## 1. INTRODUCTION

---

### 1.1 BACKGROUND

The Norwegian Federation of Trade Unions (LO) has had a framework agreement with NORAD since 1980 covering support to development projects. Approximately half the projects are on a bilateral basis, implemented directly by the LO with local trade unions in four countries - Tanzania, Egypt, Portugal and Jamaica. The other projects, covering more than twenty countries, are on a multilateral basis. The International Confederation of Free Trade Unions (ICFTU), to which the LO is affiliated, or an International Trade Secretariat (ITS) is the coordinating and implementing agency in collaboration with local trade unions.

During the period of the first NORAD-LO agreement, 1980-82, funds were distributed to projects aiming at socio-economic development and at trade union training and organisation-building. For the term of the present agreement, 1983-85, funds are only available for trade union training purposes, though the LO may apply for support for socio-economic projects through the regular channels outside the framework agreement.

One condition of the second contract was that an evaluation of both bilateral and multilateral projects should take place before the end of 1984. This evaluation is limited to trade union education and related programmes, including training courses in Norway for third world union leaders.

## 1.2 APPROACH

Prior to the evaluation team's appointment NORAD had commissioned a desk study to be conducted by the Norwegian Trade Union Centre for Social Science and Research (FAFO). The report described the general conditions for trade union activity in a large number of countries and gave a profile of the local trade union centres.

Following the study of background materials, including the FAFO report in draft form, the team made brief visits to the LO and the ICFTU. Field visits to a selection of countries were then made over a period of five weeks in August and September 1984.

## 1.3 PROJECTS

These were selected by NORAD after consultation with the LO:

### Malaysia

- 1) Training for women trade unionists/SE Asia (1981-2/NOR/W/I and 1983/NOR/W/I) - includes basic courses to cover the widest possible range of unions and some specialist courses and further training for leaders and educators.
- 2) Employment promotion programmes with national unions/Asia (1983/NOR/AS/II) - centres on a substantial research study of employment issues.
- 3) Viking Project (881/LO/3-5/84) - an exchange programme between trade unionists working for the same company in Malaysia and Norway.

Indonesia

- 1) Training for women trade unionists/SE Asia (1981-82/NOR/W/I and 1983/NOR/W/I) - includes development of the 'study circle' approach for basic trade union training and a national seminar on women workers' problems.
- 2) Employment promotion programmes with national unions/Asia (1983/NOR/AS/II) - includes research into general economic conditions related to employment prospects, and a training programme for analysts and researchers.
- 3) Trade union training (1980/NOR/AS/III and 1983-4/NOR/AS/VII) - aims to provide training in basic trade union organisation for local, regional and national officers, and to help shape a cadre of union leaders who could contribute to the country's general development.

Jamaica

- 1) Joint Trade Union Research Development Centre (888/J/0) - a substantial project supported by the four main national trade unions to develop and coordinate research and education for trade unionists.

Zimbabwe

- 1) Educational and organisational assistance to the Zimbabwe Leather, Shoe and Allied Workers' Union (1982/NOR/ITS/VI) - a programme administered through the ITGWLF to train members of this union.
- 2) Labour College (1983/NOR/AFR/III) - a project to establish a national training college for the unions, administered by the Zimbabwe Trade Union Centre.

- 3) Courses for women trade unionists (1983/NOR/W/III) - an attempt to involve more women in general trade union activity and to help more women reach positions of leadership in the unions.
- 4) Seminar in Norway for trade unionists from Zimbabwe (1983/NOR/AFR/VI) and seminar in Norway for trade union organisers from Southern Africa (Zimbabwe and Botswana) (881/LO/3-4/84) - the opportunity for trade union officials to follow some intensive training and be exposed to the principles of Norwegian trade union organisation.

#### Botswana

Migrant Labour Training Programme (1983/NOR/AFR/II) - aims to provide basic understanding of the functions of trade unions in relation to the rights and protection of migrant workers in South Africa.

#### International Trade Union School, Sørmarka

#### 1.4 MEMBERS OF THE TEAM

Prof. Einar Thorsrud (team leader), Work Research Institute, Oslo.

Ms. Helga Trulsrud, National Officer, Jern og Metall Union (Norwegian Iron- and Metal Workers' Union), Oslo.

Ms. Britha Mikkelsen, Centre for Development Research, Copenhagen.

Dr. Nitish R. De, Punjab State Institute for Public Administration, Chandigarh.

Mr. Ketil Nordahl, Workers' Education Branch, ILO, Genève.

Mr. Alan Leather (secretary), Trade Union International Research & Education Group, Oxford.

(Because of illness Prof. Thorsrud could not go to Africa and Mr. Nordahl acted as team leader.)

### 1.5 SUMMARY OF THE TERMS OF REFERENCE

The main tasks of the evaluation team were:

- to evaluate the general objectives, design and relevance of the projects, their compliance with NORAD's aid policy, and their outcome in terms of the stated objectives;
- to assess the suitability of the selected channels of assistance, in particular the roles of the LO, the ICFTU, and the local partners in initiating and implementing the projects, and to review costs;
- to discuss the role of trade union organisation in the general development process, and to assess the relevance and effect of the training projects in strengthening the role of the unions.

(For full terms of reference see Appendix II.)

### 1.6 THE TEAM'S INTERPRETATION OF THE TERMS OF REFERENCE

To understand our interpretation one should bear in mind that the following conditions were to be taken for granted:

- The countries and projects to include in the evaluation were negotiated between NORAD and the LO before the team was appointed.
- The size of the evaluation team and the selection of members were decided by NORAD after consultations with the LO and - in the final stages - with the leader of the team.

- The following timetable was decided by NORAD and the LO:

6-11 August in Malaysia covering three projects  
12-18 August in Indonesia covering three projects  
19-25 August in Jamaica covering one programme  
1-8 September in Zimbabwe covering four projects  
9-14 September in Botswana covering two projects  
(22nd September: the team leader took part in the  
evaluation session at the International Trade Union School  
at Sørmarka.)

The contract between NORAD and the LO for 1983-85 states that an independent evaluation of both bilateral and ICFTU projects should be carried out before the end of 1984. Since the team was appointed in June 1984 there was very little time for us to participate in planning or make coordinated preparations. Some of the team members visited NORAD, the LO and the ICFTU to obtain some basic information on the projects to be evaluated.

Brief preliminary discussions of the terms of reference took place in Oslo and Brussels in July. It was only on the journey out that the team as a whole first met and was able to reach some agreement on how to interpret the terms of reference and follow NORAD's general guidelines for evaluation. Step by step we developed the following approach:

- In each country we started with the basic contacts given by the LO and the ICFTU, and then split into sub-groups. This meant taking actual project operations as the starting point rather than the files in Oslo or Brussels. Plans and reports were studied as we went along.
- Each project was traced from trade union headquarters and followed as far as possible into field operations. Trade union members related to the projects were interviewed whenever possible.



- We started from the basic assumption that aid is granted through the LO and the ICFTU because trade unions can have a developmental effect under certain conditions. We then tried to assess the conditions under which the projects were implemented. Were the conditions initially such that development was likely to be enhanced? Were the conditions likely to be improved during the life of projects? What sort of short and long term effect is aimed for? Is it likely to occur? Are under-privileged groups likely to benefit? Are the projects likely to fit into a more comprehensive development strategy?
  
- We finally examined what evidence existed as a basis for recommending that the NORAD/LO contract should be renewed. And we have made suggestions aimed to help improve the LO programme, both in terms of development objectives and strategies and of the utilisation of financial and other resources.

These points should make it clear that the team understands evaluation primarily as a means to improve development policy. If the primary purpose had been to undertake bureaucratic control to ensure that the money had been spent exactly according to agreed plans, then a very different approach would have been chosen.

#### 1.7 LIMITATIONS OF THE EVALUATION

- With only one week in each country it was obviously difficult to judge the role of the unions and the training activities in the wider political, social and cultural context, although one or more members of the team had previous first-hand knowledge of all the countries visited.

- We had limited opportunities to see project operations outside the capital cities. It was therefore difficult to judge their impact upon different regions of each country.
- We had almost no contact with people in the rural or informal sectors. In all the countries visited, these sectors are of major importance and involve the majority of the population, but are generally a low priority for union organisation.
- Some of the projects visited in South East Asia are part of much larger regional programmes covering a number of countries. We visited only two and can therefore not judge the total regional context.
- The limited time we had to study reports in the IO and ICFTU headquarters before the field visits was a serious handicap for the team. However we traced the projects from the field back to headquarters and in most cases we were able to study the reports later. It must be stated, however, that not all the necessary documentation was available. In some cases there was no background information, in others no details of objectives, procedures and so on, and in other cases lengthy documents were too vague to be useful. Clearly only limited monitoring and evaluation had taken place in the past so it was hard for us to measure progress in objective terms. The FAFO material was useful but was also produced under a time constraint; more thorough reports on the countries under review would have been preferable to a full list of IO projects.

The result of these limitations, especially the lack of time and the gap in project documentation, is a concentration on the assessment of projects rather than the full effect-evaluation requested in the terms of reference. It was in practice impossible to make a systematic evaluation of the long term effects of all the projects, but we hope nevertheless that our

general points and specific recommendations are taken as attempts at constructive criticism and that the report is of assistance to NORAD, the LO, and the projects concerned.

#### 1.8 SUMMARY OF MAIN RECOMMENDATIONS

- Some degree of geographical concentration should be considered, both in terms of multi-lateral projects under the ICFTU and bi-lateral projects run by the LO (see 9.9).
- The choice of countries, types of projects and channels of aid are closely related. The LO ought to reconsider to what extent it is possible to increase the bilateral aid channelled through the LO, while at the same time continuing some international projects run by the ICFTU. The LO needs the assistance of the ICFTU and other international organisations, but the final responsibility for the quality of professional support and for development policy decisions must remain with the LO (see 9.9).
- The special functions of the ICFTU and other international organisations should be clarified in the next LO-NORAD agreement (see 9.2,3,4). Specific recommendations are made regarding project initiation and preparation, project implementation, monitoring and evaluation (see 9.6,7,8).
- Cadre-building and the strengthening of trade unions are basic conditions for self-reliance. In Southern Africa some projects started under unfavorable conditions in this respect. However, the needs for aid are greater than in any other region we visited and the Botswana project in particular should be given another chance to establish itself. More emphasis should be given to regional activities than national projects (e.g. the Labour College in Zimbabwe). Government interventions should be judged critically in Southern Africa as well as in S.E. Asia. (See 9.2)

- The choice of education target groups should be made with clear reference to their potential in terms of organisation building in different countries. This would mean reconsidering the mutual support between projects in Malaysia, and terminating some projects in Indonesia and Southern Africa (see 9.3).
- Projects directed towards the special situation of women play a major role in the LO programme, and should continue to do so (see 9.2,3,4).
- The form and content of educational projects need to be more closely related to specific cultural and political conditions in different countries. There have been particular difficulties in this respect for the projects in Southern Africa, but the Centre in Jamaica, and to some extent the women's programme in Malaysia, illustrate how the testing and revising of courses can enhance development processes (see 9.3).
- The team felt that research programmes had a potentially valuable contribution to make to mobilisation and education in unions, but that this potential was not yet being realised. The research projects should start from the practical needs of unions and their members, and feed information through in a concrete and accessible form. Links between education and research departments could invariably be strengthened (see 9.5).
- In order to implement some of the improvements outlined by the evaluation team, and to keep pace with inflation, the LO programme will need considerable increase in its annual budget over the next three years (see 9.11).

## 2. THE FRAMEWORK AGREEMENT BETWEEN NORAD AND THE NORWEGIAN FEDERATION OF TRADE UNIONS (LO)

---

### 2.1 The Terms of the Framework Agreement

A 'framework agreement' in the context of NORAD is a contract between NORAD and a Norwegian non-governmental organisation (NGO) for the financing - within the 'framework' of a NORAD grant - of the development aid activities initiated and carried out by the organisation. The implementation may take place in cooperation with a multilateral agency, although NORAD prefers that emphasis is placed on bilateral activities. The first framework agreements were signed in 1980, on a pilot basis, with three different organisations, one of which was the LO. Later, more agreements were signed, amongst others with the Norwegian Employers' Association.

So far, there have been two LO-NORAD framework agreements (see Appendix I): "Contract between NORAD and LO" of 7 January 1980, covering 1980-82 and "Contract between NORAD and LO" of 9 February 1983 covering the following three years, due to expire on 31.12.1985.

The salient point of both contracts is NORAD's undertaking to give the LO a grant of NOK 20m for each of the two contract periods. On its side, the LO is required to participate in the project financing through a contribution equivalent to 20% of the total grant, and it must not use more than 3% of the grant for its administration in Norway. The NORAD grant is given in annual portions, which may be transferred the following year.

With the important exceptions specified below, NORAD's conditions for giving the grant are by and large the same in both contracts:

- Activities must be carried out with the agreement of central and local authorities in recipient countries, and

they must benefit all members of the agreed target group regardless of their racial, religious and political background.

- The way in which activities are organised must be conducive to an early takeover of responsibility by the recipient authority or organisation. To facilitate this process the LO is obliged to organise adequate training and education of local personnel.
- The LO must comply with a number of rules and established procedures of an administrative and financial nature with respect to such matters as payments, accounting, auditing, reporting, planning, insurance and consultation. Among other things, activities are supposed to be carried out in close contact and cooperation with NORAD, and contact meetings between NORAD and the LO are to be held at least twice a year.
- Finally, should the LO fail to honour its obligations under the contracts, NORAD can demand to be fully or partly repaid.

The main difference between the two contracts lies in how the objectives of the framework agreements have been defined.

The 1980-82 contract says absolutely nothing about the purpose of the NORAD grant. The evaluation team had to consult other sources to find out that the LO might use the 1980-82 grant for socio-economic and educational projects benefiting trade unions in developing countries.

The 1983-85 contract, on the other hand, defines the objective in precise terms: the grant may only be used for training and educational activities aimed at "personnel attached to the trade union movement in developing countries" (Article 2). In other words, socio-economic projects are excluded. In addition, this contract represents a tightening of the conditions that

the LO has to comply with when proposing and implementing projects covered by the contract:

- The agreement covers trade union training and educational activities including questions related to the working environment.
- A certain degree of geographical concentration is desirable.
- Activities must have a clear base within the cooperating organisations.
- The LO must improve its control and follow-up of projects carried out through ICFTU.
- An independent evaluation of both bilateral and ICFTU projects is to be carried out before the end of 1984.
- For projects under the framework agreement there will be no additional allocations during the contract period.
- The LO may apply separately for NORAD grants for projects which do not have a trade union training profile. Such applications would be processed through NORAD's ordinary channels for support to non-governmental organisations and would fall outside the authority of the framework agreement.

From the LO's Annual Report for 1982 it is understood that the revision of the framework agreement was made at NORAD's initiative. Whereas the LO had been satisfied with the way in which the agreement had functioned, NORAD had indicated their wish to modify it in the following directions: a higher degree of specialisation with respect to subject matter (trade union training only); a limitation with respect to geographical coverage, and a stronger emphasis on bilateral activities. As we have seen, two of these points are included in the 1983-85

agreement, whereas the third was modified to a demand for better control with ICFTU projects.

In its 1983 Annual Report, in taking note of the agreement revision, the LO states that it has been difficult to obtain NORAD support for projects falling outside the framework agreement, mentioning as examples socio-economic projects aimed at health and employment promotion. The LO has therefore requested that NORAD reassess the conditions governing the framework agreement.

## 2.2 The LO's Implementation of the Framework Agreement

As this evaluation only takes place at the half-way point of the second NORAD-LO contract, it has not been possible to give a fully satisfactory comparative analysis of the implementation of the two contracts. Instead, the comparison is between facts on the one hand and facts mixed with projections and trends on the other. Comparable sets of data might have told us how the LO had tackled the stricter terms of reference imposed by NORAD in the second contract but, more importantly, they would also have given us a more reliable basis for assessing the LO's potential and capability as an agency for channeling development assistance. After all, the first contract was a pilot venture, a sort of learning process, which should allow the LO (and NORAD) some room for trial and error, at least initially. The second contract would be the test.

### i) The Implementation of the 1980-82 Contract

(Main source of information: The LO's Annual Report, 1982).

Around 55 projects, including scholarship programmes, were supported through the 1980-82 framework grant. The total expenditure was NOK 19,014,000. This represents a programme delivery of 95%, which by any standard is very good (see Table A).



Table A: Programme delivery 1980-82 (amounts in NOK 1,000)

	<u>1980</u>	<u>1981</u>	<u>1982</u>	<u>1980-82</u>
NORAD grant	6,000	6,500	7,500	20,000
Expenditure, total	4,018	6,291	8,705	19,014
" - bilateral	1,455 (36%)	3,795 (60%)	4,274 (49%)	9,524 (50%)
" - multilateral	2,563 (64%)	2,496 (40%)	4,431 (51%)	9,490 (50%)

About 17% of the projects were run on a bilateral basis, consuming 50% of the total expenditure. Except for the scholarship portion, these projects were all country projects, covering a total of four countries (see Table B). The projects were mostly of a continuing nature, lasting for the major part of the contract period. Some of them were carried over to the 1983-85 agreement.

Table B: Geographical distribution 1980-82 (Bilateral projects)

	(amounts in NOK 1,000)			
	1980	1981	1982	1980-82
Portugal	100	408	951	1,459
Tanzania	832	1,210	900	2,942
Jamaica	323	1,362	1,538	3,223
Egypt	0	315	385	700
Scholarships	0	163	200	363
Administration	200	337	300	837
SUB-TOTAL	1,455	3,795	4,274	9,524

The multilateral projects, constituting 63% of the above total of 55 projects, and also consuming 50% of the total expenditure, were run by the ICFTU, either directly or in cooperation with International Trade Secretariats. These were: the International Federation of Plantation, Agricultural & Allied Workers (IFPAAW), the International Textile, Garment and Leather Workers' Federation (ITGLWP), and the Public Services International (PSI). Although a number of the multilateral projects were of an international or regional character, covering in particular the regions of Africa and Asia, the majority were run on a country basis, covering 18 different countries (see Table C). The country projects were mainly of short duration, with little continuity of follow-up. Many of the activities were seminars run on an ad-hoc basis as far as the Norwegian involvement was concerned.

Table C: Geographical distribution 1980-82 (Multilateral projects)

(Amounts in NOK 1000)

	1980	1981	1982	1980-82
International Scholarships	0	262	0	262
	100	250	0	350
African Region	899	400	456	1.755
Asian Region	104	365	312	781
Caribbean Region	163	0	0	163
Sri Lanka	40	0	489	529
Indonesia	294	0	0	294
India	79	101	1.277	1.457
Thailand	0	11	169	180
Pakistan	0	81	410	491
Malaysia	0	0	27	27
Niger	157	0	0	157
Upper Volta	241	0	158	399
Uganda	0	72	0	72
Kenya	0	122	180	302
Togo	0	0	232	232
Nigeria	0	0	138	138
Zimbabwe	0	0	124	124
Ghana	0	0	126	126
Ivory Coast	0	20	0	20
Mexico	211	0	0	211
Equador	200	0	21	221
Peru	0	546	0	546
Administration	75	266	312	653
<b>SUB-TOTAL</b>	<b>2.563</b>	<b>2.496</b>	<b>4.431</b>	<b>9.490</b>

About 25% of the total expenditure was used for investment purposes, 39% for local activities, courses, etc., 14% to cover Norwegian projects' personnel costs, 10% for seminars in Norway and Scholarships, 8% for administration and 4% for miscellaneous project activities.

Trade union training projects received by far the largest share of the 1980-82 framework grant, representing 65% of the total expenditure.

The biggest project in money terms was the assistance to the Joint Trade Unions Research Development Centre in Jamaica, receiving a total of around NOK 3m over the years of the contract.

Training activities took place in Norway as well as in developing countries and were largely aimed at strengthening trade union organisation and leadership. A wide range of subjects was covered, with emphasis on collective bargaining, industrial relations, economics, occupational safety and health, and instructor training and development.

Target groups were trade unionists and workers' educators at various levels and of both sexes, but some of the activities were specifically aimed at women workers and young workers respectively. It is worth mentioning that more than NOK 2m were used for training programmes benefiting women workers.

Socio-economic projects received 28.5% of the total expenditure. Of these funds, more than half - NOK 2.9m - were expended on a Tanzanian trade union newspaper development project which, unfortunately, had to be abandoned early in 1983 before achieving its objectives, for reasons apparently inherent in the Tanzanian situation but not foreseen at the planning stage of the project. Some emphasis was also put on trade union self-help schemes such as the development of

workers' cooperatives and health facilities for workers, the latter activities receiving close to NOK 1m.

ii) The Implementation of the 1983-85 Contract

(Main sources of information: the LO's Annual Report 1983 and LO document 873,41 VV/ml/shr) 19/11/83: "Draft Budget 1984 - the LO/NORAD Framework 1983-85")

We seek to establish here what are the actual and projected outputs of the 1983-85 contract period as well as to examine to what extent the LO has been able to comply with the more restrictive conditions of the second contract.

The projected programme delivery (see Table D) for the whole period is slightly above 97% whereas the delivery for the only completed year (1983) was around 90%.

Table D: Projected programme delivery 1983-85\*

(Amounts in NOK 1,000)

	1983	1984	1985	1983-85
NORAD grant	6,700	6,600	6,700	20,000
Brought forward	986	815	615	986
Interest	0	250	200	450
Other sources**	<u>600</u>	<u>400</u>	<u>400</u>	<u>1,400</u>
Total available	8,286	8,065	7,915	22,836
Expenditure, total	<u>7,471</u>	<u>7,450</u>	<u>7,300</u>	<u>22,221</u>
" -bilateral	2,330 (31%)	2,388 (32%)	2,650 (36.3%)	7,368 (33%)
" -multilateral	4,476 (60%)	3,391 (44%)	2,650 (36.3%)	10,417 (47%)
" ITUS***	665 (9%)	1,771 (24%)	2,000 (27.4%)	4,436 (20%)

\* 1983: Figures based partly on the LO's Annual Report 1983 and partly on the LO's budget for 1983  
 1984: Figures based on the LO's draft budget for 1984  
 1985: Indicative planning figures

\*\* Other sources: LO/AIS

\*\*\* International Trade Union School

Taken at face value, Table D seems to indicate that the LO has ignored NORAD's stated preference for a greater emphasis on bilateral projects, as their share of the total expenditure is projected to fall by 17% over the whole period, from 50% to 33%. The actual expenditure of purely bilateral projects in 1983 represented, in fact, a share of only 31%. On the other hand, as the LO sees it, the ICFTU share is also expected to fall by 3% to 47%. This has come about through the creation in 1983 of the International Trade Union School (ITUS), which is fast becoming the largest project within the current phase of the framework agreement, estimated to cost nearly NOK 4.5m, representing around 20% of the total expenditure. Activities similar to those conducted under the ITUS heading were labelled multilateral under the previous contract. Although still conducted in cooperation with the ICFTU and some of the ITS's,

under the present contract the implementation of the project is mainly the responsibility of the LO through the AOF (Workers' Educational Association in Norway), and could thus perhaps be called a bilateral project.

As there are also considerable bilateral aspects to some of the ICFTU projects, notably the trade union training project in Indonesia, one could fairly say that the LO is at least maintaining the previous share of bilateral projects. In addition, the LO has taken action to meet NORAD's requirement of closer control over multilateral projects through regular project consultations at ICFTU headquarters in Brussels, through visits to major project areas in SE Asia and Southern Africa, and through a closer scrutiny of ICFTU project proposals and progress reports.

It seems that the LO has made an effort to meet the demand for a higher degree of geographical concentration of project activities, which now, in addition to Jamaica, are mostly in SE Asia and Southern Africa. Most participants attending the ITUS courses in 1983 and 1984 came from countries in those two regions.

The number of countries with bilateral country projects has been reduced from 4 to 3, but there is a possibility that the number will be raised to 4 again during the period (see Table E). Further, the assistance to Portugal is being slowly scaled down, aiming at a complete phase-out, but this will not take place within the current period.

Table E: Projected geographical distribution 1983-85\*  
Bilateral activities (amounts in NOK 1,000)

	Actual		Projected	
	1983	1984	1985	1983-85
Portugal	625	593	650	1,868
Tanzania**	0	0	0	0
Jamaica	825	770	800	2,395
Egypt	300	400	100	800
Scholarships	150	100	150	400
Misc. expenses	230	325	750	1,305
Administration	200	200	200	600
<b>SUB-TOTAL</b>	<b>2,330</b>	<b>2,388</b>	<b>2,650</b>	<b>7,368</b>

\* Figures based on the LO's Annual Report 1983 and Budget for 1983

\*\* The LO is considering resuming its assistance to the Union of Tanzanian Workers (JUWATA), in particular to JUWATA's trade union college in Mbeya.

The number of countries with multilateral country projects has also been reduced. So far 8 countries have been scheduled for such projects. 3 of these are 'new' (Botswana, Liberia, Zambia). In Asia there is an increased emphasis on regional projects (multi-country projects), and in some of the countries benefiting from this, for example India and Indonesia, there are also country projects (see Table F).



Table F: Projected geographical distribution 1983-85\*  
Multilateral activities (amounts in NOK 1,000)

	1983	1984	1985	1983-85
International	0	0		
Scholarships	228	0		
African Region	300	438		
Asian Region	904	1,096		
Indonesia	446	443		
India	576	275		
Thailand	473	0		
Pakistan	140	0		
Zimbabwe	682	512		
Liberia	252	0		
Zambia	0	297		
Misc. project expenses	0	230		
Administration				
<b>SUB-TOTAL</b>	<b>4,476</b>	<b>3,291</b>		

\* Figures based on the LO's Annual Report 1983 and Budget for 1983.

### 2.3 Summary and recommendations

In chapter 9 we spell out our recommendations in the framework of development policy, and suggest that a number of issues could be clarified when a new LO/NORAD framework agreement is re-negotiated. In brief:

- A preamble to the contract could outline the specific role of the LO and the trade union centres in the process of

development. Trade union education should be seen as means to an end, not an end in itself.

- More accurate terms of reference and fuller project preparation should be worked out between the LO and ICFTU.
- Education should continue to be the central activity, but some flexibility should be granted the LO to include social and other activities when this would support the education projects.
- Some geographical concentration of the programme should take place.
- Some administrative and organisational alternatives should be explored by the LO, before a new contract is signed.

#### 2.4 Afterword: Report 36

In recognition of the contribution NGOs make to the quality of life in Norway, and their potential role in the wider development process, the Norwegian Government has stated its intention in a recent White Paper to increase the amount of overseas aid channelled through NGOs. The evaluation team would support this in the case of the LO, while drawing to its attention both the advantages and disadvantages of NGOs in development co-operation, as stated in Parliamentary Report no.36 (1984-5):

##### Advantages:

- experience in international collaboration
- close contact with underprivileged groups
- ability to experiment with small scale projects
- direct lines of communication and a simple administration
- direct impact on public opinion regarding development aid

Disadvantages:

- fragmentation of aid - difficult for recipients to coordinate
- lack of consistent development strategy
- a tendency to keep 'ownership' of projects too long
- weak administration and inadequate follow-up
- lack of long-term planning and transfer of responsibility



### 3. MALAYSIA

---

Area: 330,000 sq.km.

Population: 15m, growing at a rate of 2.3% a year

Employment: Work force is 5.4 with 6% unemployment

GNP: US \$1,860 per capita (1982)

Economic growth: 4.3% a year (1960-82)

Debt service as % of exports: 5.1 (1982)

Inflation: 7.2% a year (1972-82)

Although 82% of the land is under forest, Malaysia is rich in natural resources, especially minerals. In the first half of the 20th century Malaya was Britain's major asset in terms of export earnings, though since then low prices for its raw materials, in particular rubber and tin, and the rising cost of imports have considerably weakened its economy. Growth, however, is beginning to show in the manufacturing sector, particularly in electronics.

The government's policy on economic development closely follows that of the newly industrialising countries such as South Korea with stringent spending cuts and privatisation of the public sector. More recently it has turned to Japan as a model for industrial relations and economic policy. An important factor in the privatisation programme is to increase the participation of the Bumiputras (Malay muslims) in the business sector and to raise their share-holding from 22% to 30%. Foreign investment is actively encouraged, aided by the establishment of Free Trade Zones where union activity is heavily curtailed in certain industries.

The importance of manufacturing should not, however, be over-estimated. In 1983 it accounted for 18% of the GNP while agriculture contributed 23%, although only 13% of the land is cultivated. The total work force is 5.41 million, of whom 36.5% are in agriculture (including plantations and fishing), 24.4% in commerce and services, 16.2% in manufacture, 15.2% in government and public service, and 6.5% in construction.

Although the 1982 per capita income was shown as US \$1,860 (seven times that of India, for example), the distribution of income is highly uneven. Between 1957 and 1970 the top 5% raised their income share from 22% to 28%. During the same period the share of the bottom 40% came down from 15.7% to 11.7%. The absolute income levels of the poorest declined, by as much as 35% in some cases.

#### POLITICAL BACKGROUND

Malaysia is a parliamentary federation of eleven states. The legislative process consists of the King, the Senate and the House of Representatives, with a simple majority in both houses required to pass legislation. Money Bills, however, are the responsibility of the House of Representatives.

Since independence from Britain in 1959, a government coalition has held an absolute majority in the House of Representatives. This coalition has been dominated by the highly conservative United Malays National Organisation (UMNO) party. The coalition secured 132 seats in the 1982 elections to the House of Representatives compared to the opposition parties' total of 22. UMNO's share of the 132 government coalition seats was 70.

Whatever may be thought of the government policies of support for the free market, dismantling of the public sector, and restriction of the trade union movement, it must be noted that the government is not overtly repressive. Malaysia is a comparatively free and open society where a reasonable degree of political freedom exists.

THE POSITION OF WOMEN

The position of women in Malaysian society in general is weak, and although some women might be active in social and political organisations, trade unions are not looked upon as institutions in which women should get involved.

In 1957 there were only 22,000 women in the manufacturing labour force; today the figure is 300,000. The majority of them are employed in the electronics industry, contributing 80-85% of its labour force and mostly situated in Free Trade Zones. It is reported that the gross profit rate in electronics industries is as high as 200%.

These women are primarily young, basically unskilled, often drawn from the rural areas of the country with no previous experience of organised labour and a readiness to work for relatively low pay.

The other major employer of women is the agricultural sector, especially plantations and related activities, where 38% of the total number of women in the work force is found.

TABLE 1

Distribution of women workers among different occupations provides the following profile:

Agriculture, plantation and related activities	38%
Production and related workers, transport, transport equipment operators	21%
Service employees	12%
Clerical and related workers	11%
Professional, technical and related workers	9%
Sales and related workers	8%

(Labour Force Survey, 1980)

#### THE TRADE UNIONS

Labour Force: 5.4m (1983) - about 600,000 are unionised.

#### National Trade Union Centres

1. The Malaysian Trade Union Congress (MTUC) - 102 trade unions affiliated (1982) representing about 60% of all trade union members. The MTUC is affiliated to the ICFTU.
2. The Congress of Unions of Employees in the Public Administration and Civil Services (CUEPACS) is a federation of 55 trade unions in the public service (1982).

There are a number of other federations but they are only small in membership and relatively insignificant.

Various attempts to achieve coordination or fusion between MTUC and CUEPACS have so far not been successful.



### Political affiliations

Malaysian trade unions are not affiliated to any political party. However, CUEPACS is recognised as being on the right wing of the Malaysian trade union movement and generally supportive of government policies. The MTUC is not formally recognised by the government as a trade union centre but its existence is nevertheless given de facto recognition as the most representative organisation of workers.

### Effects of government policies and legislation

The Malaysian government is a supporter of the free market philosophy. Hand in hand with this has gone a strategy of controlling and restricting the rights of trade unions and workers; a process aided by the imposition in 1969 of "Emergency Regulations" which are still in force. One example of the government's efforts to keep workers from uniting is the encouragement of the differences and divisions between the MTUC and CUEPACS.

The government's attitude to trade unions is particularly negative in the Free Trade Zones (FTZ), which are reserved as havens for multinational corporations. Workers in electronics are not permitted to form or join unions - the official reason given is that as the workers are making electronic, radio and electrical parts, rather than complete products, they do not come under the sphere of influence of the established electrical workers' union. This has particular implications for women workers, who comprise 80-85% of the 160,000 employees in the electronics industry and are not represented in negotiations with employers.

Malaysian government strategy in general has been to control the collective bargaining process by denying trade union rights where possible. Strikes, for example, are actively discouraged. In addition, the government has been promoting the development of house unions rather than national unions.

Other relevant facts

a) Much of the leadership of the MTUC is of Indian ethnic origin, with the Chinese in second place. The general assertion of Malay national identity, accompanied in some areas by aggressive Islamic fundamentalism, has not yet put any noticeable stress on the trade union movement. The Government encourages Malays to take positions of responsibility in the unions, but there are difficulties because the Malay community has a limited tradition and experience of union organisation.

b) It is the team's impression that the leadership of the MTUC is divided on the role of women in trade unions. Some are in favour of women becoming aware of, and exercising, their rights; others are more conservative and do not want any union initiatives to encourage that process. It is, however, official MTUC policy to do away with discrimination on grounds of gender or race.

MTUC Workers' Education Activities

The MTUC has its own Workers' Education Department with a full-time director. Unfortunately, he was not present when the evaluation team visited Malaysia, but some information was available in the MTUC 1979-80 and 1981-82 Reports to the General Council. Here we found out that over the two-year period April 1980 - April 1982 the MTUC organised 48 seminars and courses with a total of 1384 participants. 39 of these activities were sponsored by the AAFLI (Asian American Free Labour Institute) and none was financed solely by the MTUC itself. The ICFTU sponsored 6 of the activities, 4 of which were within the framework of the Women Workers' Training Programme. On the content side, 26 of the activities were called "leadership training" - a popular subject in Malaysia, apparently. Among other subject areas touched upon were trade union training, organiser training and collective bargaining. In addition to the MTUC activities, affiliated unions organised a total of 29 seminars.

There is no racial or gender breakdown for the above period, but we did find one in the 1979-80 report, during which period the MTUC organised 70 seminars and courses for a total of 1130 participants. Of these about 47% were Malays, 32% Chinese and 21% Indians. 81% were men and 19% women. 4 activities were aimed specifically at women workers. The ICFTU did not sponsor any of these; the ILO in cooperation with the MTUC organised a Regional Seminar on Women's Participation in Trade Union Activities (1979). During this period, affiliated unions organised 20 seminar activities.

#### Indications for the future

1. The MTUC and CUEPACS are still trying to heal the divisions between them, with a view to eventually forming a united movement.
2. A hostel scheme for women workers in the electronics industry, set up with aid from the ICFTU and its Dutch affiliate the FNV, is likely to be expanded. Union support for the hostel has enabled the MTUC to develop informal and unofficial contacts with women working in the electronics industry.
3. Despite the government policy of restricting and controlling the trade union movement, political freedom does exist to a reasonable extent. In this climate the democratic functioning of trade unions is still possible.

1981-82/NOR/W/1 and 1983/NOR/W/1

3.1 WOMEN'S TRAINING PROGRAMME - SOUTH EAST ASIA:  
MALAYSIA

---

General background

This project is part of the South East Asian Training Programme for Women Workers, which was initiated at the recommendation of the ICFTU/ARO (Asia Region Office) Women's Mission visiting Indonesia, Malaysia, the Philippines and Thailand in late 1980. The LO was represented on this mission.

From the outset, the mission recognised that although the project was regional in scope, each country would have to be treated on its own merits regarding the establishment of women's training programmes because of the vastly different social, economic and political conditions. In addition, they had to consider the differing strengths of the trade union movement and the male leaders' responses to a women's training programme. They also decided not to have any regional coordination between the different country programmes in the initial two years. The mission outlined the following general objectives for the project:

- to assist national centres in utilising already active women trade unionists to organise and train women workers and stimulate their participation in trade union activities;
- to help women make the unions, and ultimately employers and governments, more responsive to the needs of women workers;
- to help active women trade unionists, and in particular those involved in the project, lose their sense of isolation by organising workshops or seminars in which

they will have the opportunity to exchange experiences as well as acquire new qualifications;

- to organise, after an experimental stage of two years, an ASEAN seminar to analyse the results in each country and plan future activities;
- to examine labour standards and working conditions.

Separate country programmes were worked out from this common basis.

#### Malaysian background

In the 1970s a few women who were active in the Malaysian trade union movement realised that women members of trade unions were making little or no progress within the labour movement in terms of participation and representation. The occasional woman who sat on her union council was there because she had been picked by an influential man, and not elected. There was also a high drop-out rate, causing a lack of continuity, because women rarely stayed on their councils for longer than three years. The unions are historically male-dominated and unless some of the key leaders went out of their way to encourage women at grassroots, regional and national levels, they would not get a chance, whereas active male council members went to basic, intermediate and specialised seminars where they gained the ability to talk with authority and expertise.

The programme in Malaysia was designed to be carried out by the Education Department and the Women's Committee of the Malaysian Trade Union Congress (MTUC); the committee is a voluntary body with no full-time secretariat.

THE 1981-82 PROJECT

a) Objectives

The MTUC wished to give a high priority to the development of leadership among its women members. It proposed first to hold a two-week trainers' programme for 20 women and then use them in a series of courses aimed at its affiliated unions in order to provide and update knowledge in trade unionism, discuss women's problems and develop leadership skills. These basic courses would be run according to the money available over the next 4 or 5 years and would cover all MTUC affiliates. In that period, it was estimated that some 600 women would benefit from the programme.

b) Project activities

The first course to train educators, held in June 1981, was for twenty women who were already on the Women's Committee of the MTUC. They were drawn from private sector industry, statutory bodies and the civil service. The training was designed to enable them to teach basic trade unionism to rank and file members.

A series of at least 8 basic leadership courses for women were held in the following centres: Petaling Jaya, Penang, Ipoh and Port Dickson. They normally lasted for four days and had an average of twenty-five participants. These were mainly taught by the newly-trained women educators assisted by MTUC personnel.

The procedure for participant selection was similar for both types of courses. Affiliated unions were written to and asked to nominate women to attend. Not all unions cooperated in this.

An average of 27 participants attended each course, representing 12 unions. Over the four courses for which we

have information (see ICFTU report August 1983) 25 different unions were represented. Ethnic participation varied greatly between courses. Two courses were almost entirely Malay, one predominantly Chinese, one more evenly mixed. Three of the four courses were conducted in Petaling Jaya.

The basic training courses for women consisted of introductory lectures on the role and function of trade unions, labour laws, and particular problems for women in the trade unions and at work.

The teaching methods used included formal presentations, workshops followed by plenaries, and a final session of evaluation, general discussion and recommendations.

c) Participants' evaluation

The evaluation of each course consisted of a paper prepared by the participants themselves in which they outlined what areas they felt could be improved and whether they wanted other subjects included. The early course evaluations revealed that the participants would have preferred to have been taught by people who were more expert. They felt that the women teachers did not always have enough information, or were too nervous.

The Women's Committee response to these criticisms was to send the chairperson or secretary to explain that the courses were a two-way process. The women were there to discuss their common problems, but also to help provide training experience for women educators. The educators needed encouragement and support, rather than outright criticism.

d) The Women's Committee evaluation

The Women's Committee evaluation of the first two years of the programme showed that a number of the trained educators had dropped out of the education programme. There was also some

drop-out among those who had attended the basic courses, a fact that was brought to light when they were invited to participate in an intermediate course held subsequently. On a broader front, the Women's Committee registered that women were having an impact in the trade unions. For example, women were beginning to stand for elections and not just being appointed to committees. They were also getting elected as council members and some were assistant secretaries and treasurers. Others were seen as a danger to their male counterparts and were being thrown out, a rather backhanded testimony to their potential strength in the union.

#### THE 1983-84 PROJECT

##### a) Objectives

This project is continuing and is a follow-up to the 1981-82 project. Its objective is to consolidate the progress achieved under the former project by enabling the participants to acquire skills and techniques useful for their leadership and educators' roles, as well as broadening their outlook with regard to trade unions as factors of development and change.

The basic courses are being continued in order to cover the widest possible range of unions. In addition, further training is offered in particular subjects: public speaking and parliamentary procedure; maternity protection and family responsibilities; trade union finances; organising workers.

##### b) Project activities

The project was launched with a refresher course for 16 women educators, held in Petaling Jaya on 18-23 April 1983.



The objectives of the course were:

- to review the success of the courses conducted for women in 1981-82;
- to identify the areas of weakness and make recommendations;
- to upgrade the teaching skills of the women educators.

Although it was entitled a refresher course, a number of the originally-trained educators had dropped out and newly interested women had been brought in to take their place. Only six of those attending had been trained as educators in the June 1981 course. The participants coming from the Petaling Jaya and Kuala Lumpur areas were drawn from ten different unions. Nine worked in private manufacturing, five in parastatal organisations, and one each in banking and the plantation sector. They were almost equally drawn from the three ethnic communities, with six Malays and Chinese and four Indians.

The course itself lasted for one week and all but one session on the role of women in trade unions were taught by men. The programme was divided equally between talks on a wide range of trade union issues, and workshops. The presentation of each topic aimed to enable the participants to make use of the methodology as well as the contents in their own teaching, and covered syllabus, methods of presentation, teaching aids, and preparation of basic notes.

This course recommended that the next stage of the programme should concentrate on specialised topics; it also proposed specific measures to strengthen the MTUC Women's Committee and to gain equal access to trade union leadership. In accordance with the course's recommendation, the specialised seminars held in 1983 were as follows:

- Intermediate trade union seminar 18-22 July
- Seminar on greater and more effective participation of women in public and civil life 22-23 August
- Seminar on industrial safety and occupational hazards 25-27 August
- Labour law seminar 12-14 September
- Trade union leadership skills training course for women 7-11 November

ICFTU ARO assessment of the project

The ICFTU ARO Asian Regional Women's Seminar, which had originally been scheduled for the beginning of 1983, was held in Kuala Lumpur, Malaysia, on 22-28 January 1984. The main purpose of the seminar was to evaluate the performance of the whole Southeast Asian Women's programme, and it concluded that only in Malaysia had the project been able to run as scheduled. In the other countries the programme was either halted or - as in Indonesia - considerably delayed.

On the status of women in the trade union movements of the region, it was felt that some progress had been made during recent years, partly due to the project. Almost all organisations now had women's committees to formulate policies and recommend them for adoption by their organisation's executive bodies. The work of the women's committees was in certain cases supported by women's departments within the structure of the national trade union centres. These departments, however, lacked the necessary means to provide many essential services, such as research, training, and legal counselling on women's issues. More women were now members of the executive committees of their unions - in most cases through their positions on the women's committee - and thus had access to decision-making bodies. On the initiative of the women's committees, training had been developed for women trade union leaders at all levels and for educators especially at grassroots level.

## Observations

### a) Project delivery and impact

The team has taken note of the observations by the ICFTU/ARO seminar that the Malaysian project is the only one in the region that is on schedule and can confirm that this accords with our own findings.

On the other hand, it has not been possible to find evidence for the claim made by the women's Committee that the project has actually led to increased participation by women in the Malaysian trade unions. On the contrary, the considerable drop-out of educators trained in June 1981, possibly due to inadequate follow-up and monitoring, would seem to negate this claim. The narrow geographical distribution of participants in the educators' refresher course in April 1983 could point in the same direction, as could the fact that the Women's Committee continues to be a voluntary body expected to do a full-time job including assisting in running the educational programme despite their efforts to get a full-time co-ordinator.

### b) Project organisation and monitoring

The introductory documentation and subsequent reporting of the project has been of a very general nature and there appears to be only a limited attempt to consider approaches to the work, monitoring its progress, lessons learnt and future strategy.

During the life of the project, visits have been made by LO and ICFTU staff to the region as well as one visit to Norway by a Women's Committee representative. In most cases these exchanges appear to have been too brief and not sufficiently coordinated to follow the project through its critical stages.

Future plans for coordination, including bi-lateral links between Asian women and the general running of the programme,

will hopefully be assisted by the recently announced appointment of an ICFTU women's coordinator for the Asian region.

c) The training courses

Participants selected so far have been trade union leaders; the rank and file have not been reached. It was noted above that the geographical distribution of participants has been somewhat limited. This has also been the case with their work backgrounds, as the two major employment sectors for women - electronics and plantations - have not been represented. We recognise the work being done to reach the electronics workers through the hostel scheme and it will hopefully help them in their struggle to organise.

d) Contents and methodology

The basic courses were largely arranged along the lines of traditional trade union courses with an additional input specifically on women's issues. The starting point of the course was general information on trade unionism and not the situation of women workers. It should be borne in mind that the drop-out rate among women activists is high, and the points below address themselves to this problem.

It is possible that the four-day course is not ideal for all groups of workers, and other formats should be explored. The presentation of over 50% of the material was in a lecture format with limited time for discussion.

Participants felt more of the content should have been based on women's own experiences rather than the lecturers' interpretation of women's problems. A useful input would be case studies drawn from women's own observations and from the research gathered by the MTUC; the recent work on women in the textile industry is an example.

The team also felt that there was a shortage of material on women's employment in Malaysia. Better documentation was needed, which should be integrated in a relevant form into the women's training programme. Ideally, new research should be planned in cooperation with the educators.

Other materials, useful teaching aids, and ideas on ways to produce educational materials might be obtained from sources not fully exploited, e.g. the ILO education adviser in Bangkok. Since much of the women educators' work is done on a voluntary basis they have limited time for identifying sources and preparing materials.

### Conclusions

Our main conclusion is that the Malaysian part of the South East Asian Training Programme for Women Workers should be extended for at least another two years provided several adjustments of the projects are accepted by the participating parties, the MTUC and the LO/ICFTU. Suggestions and recommendations for adjustments to improve the project performance follow.

As we see it, the project has at least partially achieved its objectives by carrying out most of the training activities it set out to perform, by conscientising a group of women workers - albeit a small one - as to their rights and potential, and by assisting them in making the first inroads into male-dominated territory. Some of them have already felt the hostile response of their male counterparts and have been dismissed from their positions. This would explain some of the "drop-out" cases that we have registered. The male dominance in Malaysian trade unions and society is of course a major obstacle, but also a major reason for continuing the project, particularly as it seems possible to do something about it even if it would be wrong to expect rapid results. A serious concern has to be expressed on the restrictions put by the Government on workers' rights to organise in the electronics industry. Unless the

principle of free association among electronics workers is honoured there is less justification for continuing the project since electronics is the sector employing the highest proportion of women under unregulated conditions.

Another factor which affected the progress of the project was the disaffiliation in 1982 of the National Union of the Teaching Profession from the MTUC, which meant that some key women personalities and potential trainers left the project. Despite this, the "new" people were able to stick to the time schedule as far as the number of activities was concerned, but there was no doubt that the quality of the courses suffered. It is possible that better project planning, coordination and follow-up on the part of the LO/ICFTU could have ensured better course quality and stronger project impact.

#### Recommendations

1. The project should have a wider scope than merely providing training for women trade unionists, and should also attempt to assist women workers in developing a strong organisational base. The training would thus not take place in a vacuum but would be part and parcel of an organic, developmental approach.
2. There is a need for expert assistance to the project. This could be achieved through the strengthening of the ICFTU regional structure or by appointing a project coordinator financed by the South East Asian Training Programme. The coordinator would have to be a woman with wide trade union experience and the ability to identify the needs of women workers, to prepare training programmes and to assist in the training of women educators, organisers and other groups at various levels.
3. There is also a need for the MTUC to strengthen its women's section by upgrading it to a Women's Department with a full-time worker. As the MTUC would probably not

have funds for a post of this kind one should consider partial or full financing through the project on a temporary basis. One purpose would be to strengthen the organisation and participation of women workers in general, another to take on responsibility for the training strategy and educational and organisational follow-up. So far, this has been too much in the hands of the Education Department, whose continued cooperation, however, is necessary during the next phase of the project.

4. There is a need for better cooperation between the Research Department and the Women's Training Programme. The courses lack case-studies and other materials reflecting the situation of women workers in Malaysia, something the Research Department could help supply. The material already available from recent research on textile workers would be useful if properly adapted for training purposes. Co-ordination should ideally take place between the two departments at the planning stage of the research projects.
5. Very little capacity has been available for developing teaching aids and an adequate training methodology. This has resulted in a high proportion of uncoordinated lectures. It is important to develop teaching methodologies, such as study circles for example, which activate the participants and build on their motivation. By using this sort of approach it should be possible to start from women's own work experiences and problems, and relate them to the purpose and functioning of trade unions. The development of a participatory teaching methodology should be helped by the presence of the project adviser who must possess experience of such teaching approaches. Experience has also been gained of study circle methods in some of the unions, e.g. the textile workers' union, where advice and assistance should be available. The ICFTU Women's Bureau has a similar

experiment - Collective Self Study and Training (COSSET) - and advice should certainly be sought.

6. Possibilities should be established for the educators to meet between courses in order to exchange views and ideas, for example on teaching aids and materials.
7. The aim of LO assistance to the women's training programme is to increase local capacity to undertake training independently. To this end, long-term projects should build in a gradually increasing element of self-financing.
8. As external evaluations are normally undesirable both in terms of cost and additional pressures on the organisations, a continuous process of monitoring and evaluation should be built into the education programme. The monitoring must be a regional responsibility whereas evaluations can be undertaken locally, perhaps with assistance from the region. Sources of technical expertise are available at the ILO Regional Office in Bangkok (the Workers' Education Unit) and at the ILO/ARTEP (Asian Regional Team for Employment Promotion) Institute, Bangkok. It would help with monitoring to re-introduce the practice of registering participants' positions in their unions as part of the dossier on those attending courses.
9. The current restrictive economic climate has curtailed what may be seen as mainstream union activities, especially wage-bargaining and other direct negotiations. The training course could stimulate unions through their women activists to widen their scope and undertake other socio-economic activities, for example housing schemes, cooperative ventures, health and child care schemes, etc. It is recognised that this would be a positive long-term effect of the women's training programme. It is mentioned here since steps to broaden the courses in that direction should continuously be considered.



1983/NOR/AS/II

3.2 EMPLOYMENT PROMOTION PROGRAMME WITH NATIONAL CENTRES/ASIA  
(CONTINUATION)

---

General background

The ICFTU has sponsored an employment campaign in co-operation with national trade union centres in Asia since 1978. The continuation programme, with support from NORAD, is concentrating on five countries with the overall purpose of strengthening the ability of the trade unions to represent workers in relation to government and other agencies, and to integrate their interests into national development policies.

The national centres have broadened their scope so that in principle they encompass the needs of the rural and urban poor as well as of workers and their families. The centres have drawn the attention of governments and employers to their proposals and to their potential role in the nation-building process, and they participate increasingly in the national consultative machinery.

The union centres have prepared studies on economic and employment problems and policies for the seminars and other follow-up activities of the employment programme. Topics covered include price, wage and inflation trends and changes in patterns of employment, productivity, and technology. These have been useful but it has become clear that more systematic studies are needed and a more regular production of information and education materials. Without a continuing supply of materials, members are likely to lose the impetus and enthusiasm generated by the seminars. The centres are being assisted to develop and systematise their research programmes, and to promote the wide dissemination of research findings through the union education programmes. Union centres are being encouraged to build up documentation centres in order to

make available materials and information from other bodies. Specialised training is also a part of the programme, directed at research officers who gather and analyse the information at national level and trade union officers who make use of the information at branch level.

#### Programme in Malaysia

The national centre co-operating on the programme with the ICFTU is the Malaysian Trade Union Centre. The MTUC felt that an indepth study of employment issues would be beneficial to its future work. The purpose would be to provide a comprehensive factual basis for policy recommendations on employment. The data collected would be up-dated at regular intervals, forming the basis of a yearly economic survey. The final report was expected to be ready by August 1984, and a one-day conference was planned for September to discuss it.

The project is not in fact an employment programme in the sense of creating jobs. Any effect on the promotion of employment would be indirect and very long-term.

#### Scope and format of the study

The study has two parts. The first is an analysis of a range of socio-economic issues covering - among others - economic growth, population, the labour force and employment trends. It has been undertaken by the Assistant Secretary (Research) at the MTUC.

The second part is based on surveys of selected industries - the textile industry was chosen for the first study, partly because it has the second highest percentage of unionised workers in manufacturing. The textile industry has no national union but there are five regional unions in five states. Collective agreements governing terms and conditions of employment differ from state to state and from one enterprise to another. It would therefore be particularly useful to

assemble reliable and comprehensive data on this sector, especially in order to strengthen the unions' bargaining position. It is also an expanding sector, and employs a high percentage of women (about 75%) at low rates. In the matter of follow-up, however, the absence of a central body will be a handicap.

This part of the study is the responsibility of a professor of the University of Malaya. With the participation of research assistants, data was collected by means of questionnaires distributed as widely as possible at regional and local level.

#### Pilot survey

A pilot survey was conducted in November 1983 in order to test the questionnaire as a means of collecting data on the economic conditions of textile workers. It was also intended to determine the logistical difficulties of conducting interviews, and to help assess the performance of the interviewers. The pilot report states that "the overall performance was high, with few logistic problems... The survey did not reveal serious deficiencies in the questionnaire design".

#### Questionnaire

The questionnaire contained the following sections to obtain information on the textile workers and to evaluate their perception of various work-related issues:

- a. socio-economic and demographic background
- b. employment history
- c. wages and family income
- d. shift work
- e. manpower training
- f. health and safety

- g. trade union
- h. evaluation of job and company
- i. future mobility
- j. expenditure and savings

### Main survey

The main survey of textile workers took place between December 1983 and April 1984 in five states where textile manufacturing is based. 1000 respondents were interviewed by forty interviewers with six supervisors; 170 forms were actually returned. The interviewers were from the trade union movement which might introduce a bias factor in the collection of data, particularly in respect of the selection of respondents. The survey had too small a representation of non-trade union members who in fact constitute 50 percent of the employees in the industry.

### Observations

#### a) Employment study

1. The choice of the textile industry is relevant due to expansion in this sector, the high rate of cheap female labour, and the high turnover of workers. It also gives the opportunity to study the impact of migration to urban and industrial areas.
2. The planning of the project took place in cooperation with the regional textile unions, who were asked for comments on the questionnaire. Some disagreements nevertheless arose between the regional unions and the MTUC, because the regions were not subsequently consulted after putting forward their suggestions on the initial draft.
3. It is worth mentioning that the Penang Textile Union in collaboration with University of Penang has undertaken a study on the textile industry in that region.

4. A seminar has been called for September 3rd when the results of the study were expected to be presented, and a regional seminar planned for Bangkok on September 9th. It is however doubtful that this schedule is realistic.
5. There appeared to be confusion about the role which the regional union participants would play at the seminar and who exactly was to be invited ("various textile unions, research committee, executive committee etc."). The educational potential of the seminar seems not to have been explored. A more extensive involvement in planning by different groups would have been important in the interests of future follow-up action.
6. Considering that the women's training courses urgently need relevant material, it is obvious that the results of the textile study should be integrated into the women's training programme. Contact between the researchers and educators should be made as soon as possible to work this out.
7. According to the project document, the Bangkok ILO office should serve as a data bank with particular emphasis on comparative wage statistics in the region. This has not happened so far and will not be possible for some time, though some contact has been made with ILO Bangkok through a visit by an advisor from ILO/ARTEP to Kuala Lumpur when the textile study was discussed.
8. Limited staff at the MTUC has forced the research officer to undertake other major jobs, and even some routine jobs, not related to the employment study. This situation is unsatisfactory, and unless the research officer is left to concentrate more of her time on them, studies of this kind can only waste scarce resources. An unrealistic work-load could easily frustrate a competent and motivated staff member.

9. Due to limited staff capacity the MTUC engaged a university professor to undertake part of the study. Assistance from outside experts on particular urgent matters may be a reasonable solution, but the intention of the programme to build up the trade unions' own capacity to do necessary studies is thus not being fulfilled. Without a systematic approach and the necessary manpower this objective will not be achieved.

b) Other project proposals

10. The MTUC research committee is considering starting to gather information from the unions on collective agreements. Agreements over the past 9 years would be collected, and the MTUC would undertake an analysis of their content, to be used to compare conditions of employment covering different unions. The final decision on this new undertaking would be taken after the ILO/ARTEP advisor's next visit in October.

11. The original project intention was to create a documentation centre/data pool and a newsletter. A beginning has been made in this direction. However, with the limited resources available, we do not see how the research project on employment can effectively encompass these additional activities.

12. Regarding plans for new studies on a larger scale, the MTUC will face the problem of satisfying the individual unions' desires and needs. It may be considered whether funds could be channelled directly to particular unions, if urgent problems there justify study support.

13. There is growing interest in the situation of workers - in particular women workers - in the electronics industries. A study is justified, but given the present situation where the government refuses to allow the establishment of unions (except for house unions unacceptable to

employees), the MTUC would find it difficult to undertake a study on its own. Such a study could be undertaken in cooperation with an external organisation which might, for example, find easier access to sources.

### Recommendations

Before embarking on any new areas of research, the team is of the firm view that the data collected for the survey must be utilised effectively. To this end we make the following suggestions:

1. In the first place, the MTUC should ensure that the survey findings are utilised to the fullest extent possible by the unions concerned. This means that the union representatives will have access to reliable information, which they require for negotiating purposes and wider policy matters.
2. The MTUC, in consultation with the member unions, should decide on case-studies at company/factory level. This will be necessary to substantiate the industry-wide findings, and will also help the process of involving members and local leaders in research.
3. Action should also be initiated to ensure that the survey reports are edited and adapted to educational needs and to further the development of the documentation centre.
4. A further suggestion would be to use the survey report and subsequent case studies as discussion materials among trade union members to encourage their direct involvement in simple, concrete research activities.
5. It may be desirable to organise a workshop for active, young trade union workers to become familiar with simple research tools and methods of data gathering so that they

are encouraged to undertake studies of short duration which can be utilised for training purposes.

6. The team further suggests that the following themes be considered for future research in the Malaysian context:
  - i) The role of the organised trade union movement in economic growth and the integration of a multi-racial society.
  - ii) The labour policies and practices of the multi-national companies in Malaysia.
  - iii) The impact of cheap labour policy on the productivity and well-being of workers.
  - iv) An analysis of the restrictive measures imposed on unionisation and its consequences on workers and their basic rights.

We believe that while undertaking new studies the researchers and educators would benefit from exposure to various new approaches to research which would help make the research data more easily assimilated and translated into action.



881/LO/3-5/84

3.3 VIKING PROJECT, WITH INTERNATIONAL TRADE UNION SCHOOL  
(SØRMARKA) AND VIKING-PENANG/VIKING-NORWAY

---

The idea of this project is to bring workers together from different subsidiaries of the same company - Viking - which produces rubber footwear. The aim is to broaden the outlook of the participants, to encourage international trade union links at shop-floor level, and to help strengthen the union in Penang.

The idea was first suggested as long ago as 1980 but did not become a firm proposal until August 1983 with the intention that the exchange visits would take place a year later. Because of problems in planning they were postponed, so the outcome could not be evaluated by the team, but we have some comments which we hope will be of use. We made two visits to the Viking-Penang plant and got some insight into the necessary conditions for such a project to be successful. We also wish to discuss some of the assumptions which are implicit in the project plans, about the transfer of knowledge and skills and of organisational principles across cultural boundaries.

The project plan consisted of two basic elements:

- i) 7-16 October 1984: a Norwegian group of 6 people to visit Penang (2 shop stewards, 2 from the management of Viking-Norway, one from the chemical workers' union and the course leader).
- ii) 17-27 October 1984: course at the Sørmarka trade union school in Norway for the Penang group. Also participating would be the Norwegian group who had visited Penang and other union representatives. (The Malaysian group would consist of 4 union and 2 management representatives).

The preliminary estimate of costs is NOK 175,000 for travel and accommodation for union representatives. (Compensation for lost wages of the shop stewards and the participation of management representatives was assumed to be covered by the employers.)

The Norwegian course plans contained the following main items:

- Visits to Viking plants, Mjøndalen and Stavanger
- labour law and agreements in Norway and Malaysia
- labour relations at Viking-Norway and Viking-Penang
- new technology-based production systems
- health, safety and the work environment
- worker participation in Norway
- worker-management relations
- international trade union collaboration
- trade union-political collaboration
- trade union study and education activity

The relationship between industrialised and developing countries and the internationalisation of industrial production were general themes to be discussed under different headings. These issues were only implicit in the programme documents and had little impact on the draft timetable of the course.

We met the Malaysian personnel director of Viking-Penang, who expressed positive interest in exchange visits and trade union educational activities. But he felt that the Viking management in Penang and Norway should have been consulted at an early stage in the planning.

We also met the Viking-Penang shop stewards and the union secretary who had been selected for the trip to Norway. They all looked forward to this great adventure which had obviously caused considerable excitement among friends and family members. They were naturally upset when they learned from Viking-Penang that there were still problems with the planning and the trip might be further delayed.

We discussed the programme with them as far as they knew about it, and came away with a number of questions which need to be discussed in view of previous experiences with similar projects:

- i) The question of participatory planning is a crucial one. The Penang union representatives had been given some chance to express their views, but they agreed that more time and better preparation on their side would have been desirable. In particular, they felt a need to understand the long-term perspectives of Viking/trade union relationships before making their own priorities regarding potential reforms of a concrete nature. Safeguarding employment was obviously their major concern. It was unclear if and how this issue would be covered by the project, likewise whether comparative wages and other bargaining issues could be studied in a constructive way during the brief visit.

The Viking management was informed far too late (via the Norwegian Confederation of Employers), and they reacted negatively, partly because direct consultations had not taken place between the union and the enterprise, partly because the programme outline did not convince management that it was likely to bring positive results. Potential benefits did not seem to justify the considerable expenses.

The direct involvement of union representatives and management in Penang and Norway over a period of at least one year seems necessary in order to establish support and prepare a solid programme. The project might have to start with some sort of study of why and how Viking established a subsidiary in Malaysia. Recent changes in markets, technology, employment, etc. would have to be understood as a basis for possible developmental activities. In addition, the Malaysian representatives could learn from direct observation how shop stewards in

Norway operate in relation to the work environment, grievances, bargaining, information-sharing, and participation in management.

A time-consuming but highly educational involvement in project planning, execution and follow-up would have several advantages: concrete and jointly-agreed objectives could be established; pre-study and preparation could be part of the selection of participants; the transfer of responsibility from the LO to the Malaysians could take place systematically; a step-by-step evaluation with adjustments to the programme could be part of the long-term development process in Penang and in Norway.

- ii) The question of cultural accommodation is also critical. The two groups would certainly benefit from the tour and the face-to-face contacts, but the developmental effect would be marginal if great care were not taken to avoid the culture shocks involved. The shop stewards we met were highly motivated, but quite concerned over practical problems like language, food, climate, contacts with home etc. They were unprepared for judging what they ought to give priority during their short visit to Norway. Their Norwegian counterparts could perhaps be of some help in this respect during their visit to Penang, but how much would they understand of the Malaysian situation after one week there? The major effect on them would probably be an increased awareness of the developmental problems involved in the internationalisation of industry.

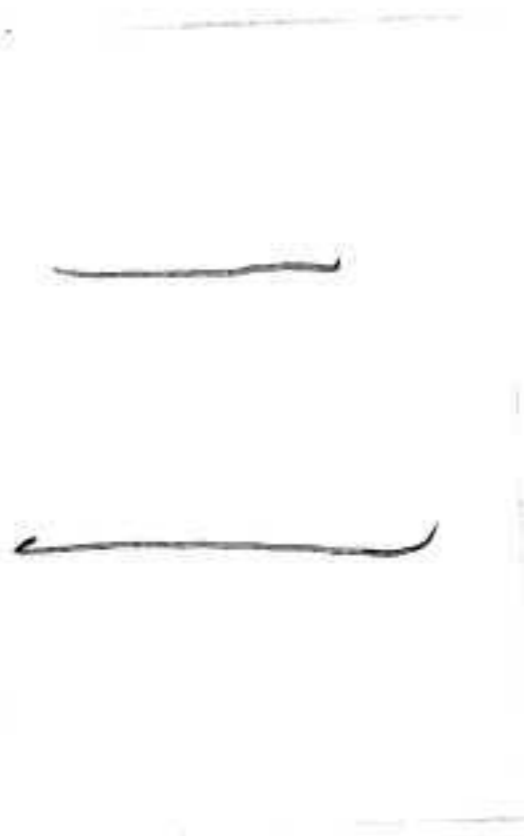
A major problem is that projects of this kind are usually based on the assumption that the European trade union system (or a US model) is directly relevant to a country like Malaysia. Perhaps a useful outcome of this particular project could be the realisation that this is not necessarily so. A two-way exchange of experience would be possible over time since Malaysia is likely to be involved in a vast industrial expansion in South East Asia

with considerable impact also on Norway. But if this were to be a major objective of the project the resources put into it would have to be much larger and the time perspective much longer.

- iii) Our main impression is that this project has some interesting possibilities, particularly if combined with other educational and developmental projects in the region where the LO is involved. It would give a direct grass-root experience involving both nationalities which is often lacking in development work. But to succeed in this way the project would have to be expanded radically and the planning would need to be much more elaborate. It would have to start with the concrete problems which the Penang workers want to deal with. The problems chosen would help decide the participants in the project. Plans for follow-up after the trip to Norway would have to be part of the whole programme.

A first step in exploring a fresh start for this project might be for the LO to renew its contact with the Viking managements and unions and with the Confederation of Employers (which has a framework contract with NORAD similar to the LO's). In the meantime swift action should be taken to avoid further disappointment among Penang trade unionists who were getting ready to start travelling when we visited them.

The evaluation team was not aware of the exact status of this project at the time when we made the comments above, but we have subsequently been informed that the visits have been put off until 1985. We would strongly advise that the basic idea of this project be maintained in the LO's international work, and suggest that similar exchange be arranged in other companies, no matter the outcome of the Viking project. The proposed Viking exchange has been a valuable pilot, and lessons may certainly be drawn from it.



#### 4. INDONESIA

---

Area: 2m sq.km. (+ a lot of sea)

Population: 160m, growing at a rate of 2.3% a year

Employment: work force is 64m with 4% unemployment (official figures); 44% underemployment (estimate)

GPN: US \$530 per capita (1982)

Economic growth: 5.7% a year (1970-77), 2% in 1982

Debt service as % of exports: 8.3 (1982)

Inflation: 19.9% a year (1970-82)

The diversity of Indonesia is immense; over 13,600 islands carry a population of 160m, comprising 300 ethnic groups with 250 different languages. Development is perceptibly uneven, with Java alone accounting for almost half of the GNP, 62% of the population, but only 7% of the land area.

Indonesia's major export is oil, accounting for 66% of its foreign earnings, though in terms of numbers of jobs the industrial sector is only a small employer. 60% of the work force are in agriculture (including plantations), 14% in trade and banking, 12% in services and 9,5% in mining and industry. Only a minority of the work force, however, can be characterised as wage-earners. Estimates made between 1980 and 1983 suggest that 30% are in paid employment, 40% in the informal sector, and 30% are listed as "unpaid family workers". Even among wage-earners, most average less than U.S. \$1 a day, even in local terms not considered a living wage, and the proportion of the population in absolute poverty was 51% in 1978. The lowest 20% share only 6.6% of household income while the highest 20% have 49.4%.

Economic growth has slowed drastically since the 1970s and the current 5-year plan has employment provision for only 6.1m. of the new labour force estimated at 9.3m. Inflation has, however, slowed from over 20% to a current 11.4% (1983). Economic policy emphasises exports and foreign investment. The glut in the world oil market has caused a severe loss in revenue, and public expenditure - especially on services and development projects - has been cut substantially.

POLITICAL BACKGROUND

On the surface, Indonesia is a unitary state with a constitutional government. It has a President and two national legislative bodies, the Peoples' Consultative Assembly and the Parliament. In reality, President Suharto dominates an authoritarian regime whose power is based primarily on the support of the armed forces.

Only 3 political parties are allowed to present themselves for election: the Development Unit Party (DUP), Indonesian Democratic Party (PDI), and GOLKAR. The DUP is an Islamic party, mainly concerned with religious matters. Both it and the PDI are only allowed to run election campaigns and do not function as political parties between elections. GOLKAR is the only party allowed to function all the time and is the political instrument through which President Suharto dominates Indonesian society.

During 1965/66 the entire political opposition to the Indonesian government was eliminated by the military, following an attempted coup d'etat.

After this, a 'New Order' was introduced by President Suharto based on the concept of Pancasila. Pancasila rests on five principles (religion, humanity, Indonesian unity, guided democracy and social justice) and now rules all important institutions in Indonesian society. The 'New Order' is designed to regulate all spheres of life in Indonesia, and ensure that the policies of President Suharto are carried out without hindrance. These policies may be summarised briefly as a western-oriented foreign policy, a growth and export-oriented economy, cuts in public expenditure at home.



THE POSITION OF WOMEN

The pace at which Indonesia is being integrated into global industrial production causes tremendous disruptions and changes in society. Women more than any other group are being affected by these social upheavals.

In concrete terms women are being absorbed into the labour force at a rate of close to 4% annually. In the growth sectors of the economy, e.g. electronics, pharmacy and textiles, women workers make up 60 to 75% of the labour force. Altogether there are approximately 20 million women in wage employment.

The absorption of women into the labour force has mainly been in the least regulated sectors (for example in plantations where women comprise about 80% of the workforce) or in sectors which depend on a low-wage labour force. Women's wages are way below those of men; an average wage for women in Jakarta is equivalent to about 50 US cents a day.

An element of the Pancasila philosophy is the formation of women's groups with, however, strictly limited functions. For example the mandatory organisation of the wives of public employees concentrates on social welfare activities. Within trade unions women are up against tremendous obstacles when they attempt to organise with the purpose of influencing and improving their work conditions.

## THE TRADE UNIONS

Labour force: 63.9m at the beginning of 1984 - 3m (1982) are unionised.

### National trade union centre

Federasi Buruh Seluruh Indonesia (FBSI) was established as part of the 'New Order'. There is no freedom of association in Indonesia and wage earners are only allowed to organise under the FBSI or KORPRI. All workers in the civil service and in state corporations are required to belong to KORPRI which is not a trade union centre and has no bargaining functions. This means that the FBSI can only organise in the private sector. It has 21 affiliated national unions and some 10,000 'locals' at plant level.

The FBSI has no official international affiliation as yet and its Central Executive Board is divided between support for the ICFTU and for the WCL (World Confederation of Labour, the international grouping of predominantly Christian unions) - this split has a significant effect on various areas of the FBSI's work. It is anomalous that some of the old Moslem national unions still exist, even though the FBSI is the official national centre, and are still on the ICFTU register of affiliates. The President of the FBSI is also a leading figure in one of these - GASBIINDO, the Federation of Indonesian Islamic Unions. The ICFTU link, though maintained in a somewhat indirect manner, appears to be valued by trade union leaders and the authorities.

### Political affiliations

The FBSI is required to be non-political for, under the the precept of Pancasila, political expression is the role of GOLKAR. However, Pancasila has acted as a major intervention medium in the hands of the government and the FBSI is to some extent a

part of that structure. At the same time, it must be remembered that the FBSI needs to balance on a very thin line in order to fulfil even some of its elementary trade union duties.

### Effects of government policies and legislation

Whatever the effect of Pancasila on the overall development of Indonesia, it provides the FBSI with little freedom for legitimate action and autonomy.

The extent of control exercised by the government over the labour situation can be understood when the directive to the military to intervene in industrial disputes is examined. Tripartite Councils to deal with industrial disputes generally include the police and security forces. Industrial action by local trade unions is banned in some sectors of the economy. In other sectors, although no official ban on industrial action exists, such action is 'not permitted' by the authorities.

The status of trade unions is highly restricted; only wage-earners in the private sector are allowed to organise in trade unions and they in turn are forced by law to choose the FBSI.

### Indications for the future

1. The organisation of labour remains the only hope of workers developing any strength or influence over the future course of the country, and despite its limitations the FBSI remains the only official body in a position to help with this process.
2. Despite all the repression, workers have continued to attempt to assert their natural rights. During 1982 and the first half of 1983, for example, the authorities admitted to 142 strikes taking place. The FBSI claims that for every official strike there are two or more unofficial strikes not recorded by the government.

1981-82/NOR/W/L and  
1983/NOR/W/I

#### 4.1 TRAINING FOR WOMEN TRADE UNIONISTS - S.E. ASIA: INDONESIA

---

##### General background

(See 3.1.)

##### Indonesian background

This project aims at training women trade union educators and was initiated at a time when great changes had been taking place in the Indonesian economy and labour market. By 1982 about 35% of the labour force were women - approximately 20m. This process of integrating women into wage-employment is continuing, for example in electronics, tobacco, textiles, pharmaceuticals, and in the plantations. In certain sectors the participation of women has reached about 70%.

There are indications that a general decline in family income is an important reason why women have been pushed into the labour market. Women are generally involved in economic activities where wages are low both by regional and international standards. FBSI estimates show an average daily wage of Rp.600-700 in Java and Bali and Rp.1000 in Jakarta. (Rp.1000 = US \$1). Many women workers, according to these estimates, are paid far below this at Rp.400 per day, for example in the textile and batik-printing industries of Jakarta. Only through very long working hours do they increase their earnings to about Rp.900.

Out of national labour force of 60m. only about 3m. are trade union organised. Women have a very low representation in the trade unions at both regional and national level.

The programme was thus initiated in 1981 in a situation where increasing numbers of women were coming onto the labour market, most often into low-paid jobs, and where their participation in trade unions was very restricted.

### Objectives

The objective was to train a nucleus of two or three women for each province who would be able to educate women workers and stimulate their participation in trade union activities.

Two training courses would be organised in 1981, one in Jakarta and the other in Ujung Padang. The trainees would receive special instruction in study-circle techniques because they would have to work in a very decentralised matter. They would plan, with the programme coordinators, a number of activities to carry out in their own provinces. The programme coordinator would be responsible for the preparation and dispatch of material to the study-circles as well as for collecting their reports.

At the beginning of 1982, four seminars would take place in different regions of Indonesia to give the trainees an opportunity to exchange experiences and present new ideas; part of these seminars would also be devoted to methods of organising workers. For the rest of the year the participants would be responsible for co-operating with the unions in their regions covering sectors where large numbers of female members were employed. They would assist them in organising the women and in training organisers.

### Project activities

The project was placed with the FBSI Women's Department, and funds were channelled via the ICFTU office in Indonesia. The programme was begun with a national seminar in February 1982 on women workers' problems. This was held at Ciloto, Jakarta, and there were 19 women worker participants from four different

regions of the country. A second seminar was held in May at Batu Malang (East Java) with 24 participants from another four regions.

At these seminars they developed discussion materials on the problems of women workers to be used in the modified study-circles, while at the same time training the participants to become study-circle leaders. This teaching technique was taught with assistance from a Norwegian instructor. The instructor praised the sincere dedication of those who planned and participated in the seminar.

It was noted that male FBSI executives who visited the seminar tried to disrupt rather than encourage the women's activities.

After the seminars several of the participants went back to their regions and started study-circles, 3 in East Java, 2 in Jakarta, of which one failed, and 2 in North Sumatra. A reunion of study-circle leaders was held in Jakarta in August 1982 and learning material was developed and sent around to all study-circle leaders by November.

In 1983 the project maintained contact with the study-circle leaders through mailings and two regional meetings. In addition, Ms. Nurida was appointed to assist the Head of the Women's Dept. in the preparation of regional meetings. In order to maintain contact with women activists in Jakarta meetings were started in the latter part of 1983 on one Sunday per month, and have been maintained ever since.

The project budget was not totally spent in the 1982-83 period which enabled work to continue until the middle of 1984. An application by the FBSI Women's Department for further funding was submitted to the ICFTU. The application was for 123 study-circles to be run with four unions: Metal Workers, Electronic Workers, Textile Workers and Food & Beverage Workers Unions. The application was finally turned down in June 1984 on the grounds that the newly installed GASBIINDO Women's

Committee was now the coordinating body for the women's training programme in the FBSI - a surprising decision since GASBIINDO represents only a small minority in the FBSI.

The incomplete information at our disposal makes it impossible for us fully to explain the reasons for the change in responsibility for women's training in the FBSI. We are clear, however, that it has important ramifications and these will be commented upon later.

The GASBIINDO Women's Committee was formed by the President of the FBSI in the latter part of 1983. The women on the committee had little or no previous experience in the trade unions or their education programmes, though they appeared keen to learn and were prepared to put some time and energy into the programme.

In December 1983 they submitted their own application to the ICFTU for a "Trade Union Educational Programme for Women Labour". This was an extensive programme over four years due to start in June 1985. (The same application was submitted to at least one other funding agency.) The ultimate goal of the programme was to build cadres of women labour leaders with the capacity to stimulate women workers to become more active in the labour movement and thereby improve their working conditions. The project was designed to train women educators from the various regions of the country, who would in turn run weekend courses and one day monthly courses.

The ICFTU agreed to support the project for one year; the project proposal was considerably amended and the budget much reduced by the ICFTU. Future funding would be based upon the results of an appraisal undertaken by the ICFTU of the year's achievements.

#### Observations

1. There is an urgent and continuing need for women workers in Indonesia to better their situation in the labour market and society in general. To this end trade union

training could help. The LO/FNV/ICFTU supported programme was initiated with this objective.

2. The team experienced considerable difficulty in collecting the material necessary to report on this project. In the first place, our requests to meet the Head of the Women's Department were not acceded to and we had to make our own arrangements. Secondly, certain materials prepared and collected by the GASBIINDO Women's Committee especially for the team's information were intercepted and withheld by male functionaries in the FBSI.
3. The study-circle programme in Jakarta and different regions was slow to get started but once established helped groups of women educators to gain experience in running study circles based upon materials they had developed with the Women's Department.
4. The training methodology developed with the programme appeared to reflect a realistic understanding of the role of women in the workplace, trade unions and society. It started from women's own perception of their position and built a strategy for change based on that understanding. The personnel running the programme had considerable experience within the trade union movement at different levels of organisation.
5. Factionalism within the FBSI has meant that some unions with a high percentage of women workers, like those in the electronics industry, were not invited to send members on courses.
6. The formation of the GASBIINDO Women's Committee was not because of fundamental weaknesses in the 1983-84 training programme but rather because of political and personal antagonisms within the FBSI.



The team was concerned that the elected Head of the Women's Department could have her programme curtailed, at a time when it was beginning to show positive results, and be replaced by a group with no standing among women in the trade unions. This has led to some apprehension about future programmes.

The establishment of a new and essentially separate project has undermined and weakened women's training in Indonesia for the following reasons:

- a) There are no direct organisational links between the Women's Department programme and that of the GASBIINDO Women's Committee. They do not share a common methodology, organisational structure or educational materials, and some of their programmes even compete for participants (e.g. Sunday meetings).
- b) The Women's Department programme has been cut off from the financial and moral support of an important section of the international trade union movement.
- c) Institutional support and encouragement for the work of the Women's Department is no longer available from the pro-ICFTU faction of the FBSI.
- d) It has long been recognised that women's training is one of the most difficult areas of trade union activity, especially in societies of excessive male domination, and it therefore demands a high degree of commitment and expertise from those engaged in administering and running training programmes. The reorganisation of the funding has meant that the programme is now being run by a group of women who do not have this expertise and lengthy discussions with the GASBIINDO Women's Committee revealed that they see their contribution to trade union work in terms of welfare support rather than the organisation of workers.

7. Although a research officer has given occasional assistance to the Women's Committee, there is no systematic co-operation between the different departments of the FBSI, for example between the Research Department and the Women's Committee. Yet information on women's employment in Indonesia today is very scanty.
  
8. A report prepared by the GASBIINDO Women's Committee had been received by the ICFTU Women's Bureau on the first one-week course held in Malang at the end of August. The report gives a full account of the seminar and indicates that it accomplished its aims and objectives. The director of the Trade Union Educational Programme, Mr. Bjørn Strøm, made an important contribution to the seminar and has also assisted - albeit in his non-official capacity - with the Sunday meetings in the Jakarta region. These seem well-established (since early 1984) with an average attendance of 50 women plus a few men.

#### Conclusions and recommendations

The team has serious reservations about recommending further support for this project.

Firstly we are concerned about the organisational framework of the FBSI, and secondly about the ability of the GASBIINDO Women's Committee effectively to reach the target group for whom the project is designed.

We are of the opinion that the restrictions of the organisational framework present problems that are common to all three projects we were asked to evaluate in Indonesia. The experience of the Women's Department is a particular illustration of this. In addition there was little consultation with the funding agencies by the FBSI about this change in spite of the fact that the funding agencies had originally been warmly encouraged by the FBSI to work with the Women's Department on a long-term women's training project.

It cannot be stressed strongly enough that we do not want to contribute to any destruction of seeds that may grow into honest support for Indonesian women workers, but the team sincerely feels that the intricacies involved in supporting women's education at the moment are beyond the capability of Norwegian trade unions. We therefore recommend ending support for this project.

If the situation develop in a way which justifies a renewed consideration of support, we recommend that the task be taken on by supporters with a better understanding of the Indonesia situation - based on historical ties for example - and only after careful investigation of the context in which women workers' education is to be placed.

4.2 EMPLOYMENT PROMOTION PROGRAMMES WITH NATIONAL CENTRES:  
INDONESIA

---

Project background (and see 3.2)

The national centre collaborating in the programme is the FBSI. Its Research Department was set up in 1980 with 25 participants trained in basic methods by the Central Bureau of Statistics, and headed by a director with a background in banking. Studies it is already conducting include household surveys, market surveys, and an analysis of collective agreements. It has produced two major documents incorporating secondary and primary data, 'An overview of the socio-economic conditions of Indonesia as it faces Pelita IV' and 'An overview of the socio-economic conditions of Indonesia in the first year of Pelita IV', Vols. I and II. (Pelita IV is the national development plan for 1984-1989.)

An innovation of the Research Department has been the establishment of local research and development societies, which collect and monitor various data for a monthly bulletin. It has extended its network in other directions by involving the University in some of its seminars.

Objectives

The project proposal outlined the following objectives:

1. The research programme intends to make a thorough examination of the employment situation, general economic conditions and their effect on wages, benefits etc, and to publish a yearly national economic survey plus regional surveys.
2. Training courses will be held for analysts and researchers to improve their skills. The following courses are planned:

- In 1983, one three-day seminar at national level for 15 participants
  - in 1984 and 1985, six weekend courses on basic statistics at regional level for 20 participants each.
3. An evaluation of the three years' activities will be carried out at the end of 1985. About 30 persons from national and regional offices will take part in a three-day evaluation meeting.

### Finances

Support (US \$30,000 a year) for the FBSI Research Department comes from the Asian-American Free Labor Institute (AAFLI) as well as from the LO (US \$11,000 a year) and the FNV (US \$14,000) through the ICFTU. The AAFLI grant sustains three researchers and the cost of printing the monthly bulletin in the national language 'Bulletin Litbang'. The ICFTU grant, initially for 2 years, is intended to support one researcher and the publication of the annual survey. However, budgets do not seem to be kept strictly separate.

### Observations

1. The two reports on socio-economic conditions are substantial and fairly comprehensive. However, it should be noted that the analysis generally conforms with the official line, and critical questioning has on the whole been avoided, as have a number of key issues, for example:
  - a) Although a more equitable distribution of wealth is a national objective, data which is available on the distribution of income is not presented in the reports.
  - b) Productivity is referred to in the context of the development of workers' skills, but other contributory factors such as management orientation, technology upgrading and the price-profit nexus are not mentioned.

- c) The analysis does not indicate capital/labour ratios in different industrial sectors which would be necessary for any discussion about employment creation.
- d) In the survey by sector the productivity indices have not been worked out, which limits their use in wage negotiations.
- e) There is no analysis by sector of present or potential employment opportunities.
2. The data collected was often of a rather superficial nature and showed a lack of insight. The government statistics were presented at face value and there was little attempt to extrapolate any figures that might indicate important trends.
3. There is some comments on the relationship between wage levels and minimum physical needs, and on the problems of unemployment, from which we have drawn the following conclusions:
- the problem of income in relation to inflation has not been explored systematically
  - the majority of workers continue to earn approximately US \$1 per day
  - there is evidence of a decline in real wages since 1981.
4. Apart from the content of the reports, there is the question of their application and usefulness especially in terms of education. They are distributed to the unions in their present format as macro-level information, but it is difficult to see their operational significance.
5. We were impressed by some of the research methodology especially the training and use of a number of part-time information gatherers. This approach established the

possibility of undertaking interesting research programmes in the future.

6. The research programme has suffered because of a certain lack of experience amongst those responsible for its management. This may be partially remedied by the recent addition of a statistician to the staff and a forthcoming training programme in Brussels for the Director.
7. The ICFTU faces difficulty in coordinating its part of the FBSI research programme because it is not altogether clear where the AAFLI funding of research starts and finishes.

#### Conclusions and recommendations

1. In view of the limited usefulness of the data collected either for training or for negotiating purposes, we recommend that the project should not receive further support from the LO.
2. Should the FBSI wish to continue receiving support for research then two types of action can be contemplated:
  - i) A positive commitment needs to be made by the government that a proper climate will be assured for the collection of data on a realistic basis and that findings will be made freely available to trade unions, funding bodies and development research institutes.
  - ii) The main focus of research in Indonesia should be devoted to the following issues:

- a) Priority should be given to the preparation of local case-studies, with the participation of local members and results being made available through the training seminars.
  - b) Studies might be made by sector of the factors which affect productivity levels, and the implications examined of current government policy on this issue.
  - c) The majority of the workforce are in the 'informal' sector and research needs to be conducted into patterns of work, conditions, and wages. The material collected should be used to assist in the organisation of the workforce, the improvement of conditions, and the creation of employment.
  - d) We recommend that an overall balance should be established between macro/statistical and micro/qualitative studies; and urge that all information gathered by the Research Department should be disseminated in accessible form through the education programme.
3. The ICFTU needs to develop monitoring and evaluation mechanisms if the project does continue.



4.3 INDONESIA: TRADE UNION EDUCATIONAL PROGRAMME AND  
PROGRAMME DIRECTOR (CONTINUATION)

---

Background

The need for trade union education in Indonesia stems both from the low level of unionisation - some 5% of the workforce - and from technological and industrial developments which make the job of union leaders increasingly complex and demanding.

The present project is a continuation of 1980/NOR/AS/III: 'Indonesia - Trade union education and programme director', under which Mr. William Lawrence of the ICFTU conducted 15 weekend and evening courses in cooperation with the Education Department of the FBSI for branch officials, shop stewards, and rank and file workers in the Jakarta area and other bigger centres. The total number of participants was 564 of whom 85 were women.

The present project was originally scheduled to start in 1983, but did not get underway until February 1984 when the new programme director, Mr. Bjørn Strøm from Norway, arrived in Indonesia. This means that the project had only been operating for about 6 months out of a planned 4 years when we visited Jakarta, so it is premature to pass a full judgement on its performance at this stage.

Objectives

The first objective, which could be called the immediate objective, is to provide a basic training in trade union organisation. This covers administration, financial control, negotiating the Collective Labour Agreements (collective

bargaining as such is not permitted), labour legislation, and health and safety measures.

A second objective, which could be called the development objective, is to improve the leaders' understanding and ability so that the unions can be strengthened and the trade union movement made more free and democratic, which 'will enable the unions to play a role in improving social standards and implement a more equal distribution of wealth within community life' (project proposal).

### Target groups

The main target of the programme is the union leadership at all levels, from shop-floor representatives through regional officers to full-time national officials.

Participants come from areas identified by the FBSI as being of high priority in terms of need; letters are sent to regions requesting them to invite the 'locals' to nominate participants. 10%-30% of these are supposed to be women, though this percentage is not always taken up.

### Personnel

The ICFTU Programme Director runs the project assisted by an FBSI Coordinator. At regional level an organiser is appointed for the duration of each course.

### Course contents and methodology

A broad range of programmes has been conceived. Courses are flexible in their format, being both residential and non-residential and of varying length. The residential courses are generally for one week, though they may be extended; they take up to 25 participants. There are four types of residential programme: educators' courses (one week, 25 participants); collective bargaining seminars (5 days, 20

participants); trade union programmes - basic and advanced (6 days, 25 participants); and specialised seminars (one week, 25-30 participants).

The programme for the second year (1985) aims to include:

- a) a further training of educators course in Sulawesi;
- b) two seminars on negotiation techniques, one in Sulawesi and one in Bali;
- c) three courses on basic trade union subjects, two in Kalimantan and one in Sulawesi.

With respect to methodology, we were made to understand that straight lecturing was the predominant teaching method in Indonesia. In the previous project and the initial phase of the present one this had been the case, but the programme director told us that it was now being changed and more emphasis put on questions and discussion sessions with considerably shorter lectures than before. He was contemplating introducing study-circles as the basic learning approach, and also using video to replace specialist lecturers in regional courses as a measure to cut costs. He aimed to maintain momentum through weekend 'get-togethers' of previous course participants to discuss specific issues of concern on the shop floor. This idea was said to be working reasonably well in Jakarta area, though lack of finance was a constraint.

Report on basic trade union course, Denpasar, Bali, September 1984 (one week)

The 25 participants were all women. They came from 7 industrial unions and were also representing 21 'locals'. None was a union leader, and it was recognised that most of the local leaders were men, although there were more women workers than men in the industries of Bali. It was generally perceived as a problem to combine active union membership and responsibilities at home.

All the lecturers but one were from the FBSI. The women responded well to the course and took an active part in discussions throughout. They felt that the hours were slightly too long and it would be preferable to reduce the day's work by one hour and add an extra day on the end. They stressed the importance of local, non-residential courses for women who had to look after a home as well as work.

They appreciated the materials which had been given them: a set of five ICFTU booklets, several FBSI booklets on labour legislation, and copies of the lectures.

At least 6 women were found who would be suitable and available for further education, and there was a general call for intermediate courses on strengthening the unions, to cover in particular the settlement of labour disputes, bargaining techniques, and education. In the meantime they would continue to meet once a month, led by the chairwoman and secretary of the Bali Women's Committee, who had both just finished the training course for educators run by the FBSI DKI Jakarta Women's Committee.

Evaluation

All courses include evaluation sessions. In some cases this is done orally and in others by questionnaire. Reports by the

project staff are submitted to the ICFTU after each course and at the end of each year. On completion of the project a final report will be made, including the evaluation findings, and making proposals for the future development of trade union education in Indonesia.

### Observations

1. In monetary terms and in terms of expected output this is by far the largest LO/NORAD project in Indonesia. The total cost over the planned four years is estimated at US \$450,000 (including provision for cost increases), equivalent to around NOK 4m. Almost 45% of this would be used to cover the cost of the programme director. If we include the cost of the national educational staff the total manpower cost will represent about 55% of the total cost estimate for the four years.
2. We were surprised to learn that the programme director was not based at the FBSI but had his office in his private residence. This severely reduces the efficiency of his work.
3. Although the ICFTU programme seeks to follow the framework set out in the project document and will probably be able to achieve the immediate objective, it is doubtful whether the development objective is attainable at all. In the present situation in Indonesia, a time when the country has a 'free and democratic' trade union movement in a position to 'implement a more equal distribution of wealth within the community' seems to be years away. In any case, the project has not designed a strategy for attaining this goal, for example by giving the programme director a clear advisory function with respect to FBSI policies in the field of workers' education, which would put the project in an organic trade union context. Training without a training policy is meaningless. It is to be hoped, however, that the programme director, through

- the merit of his own performance, will be able to move himself into a position where he will be listened to.
4. The FBSI has other sources of funding for training activities. The programme director maintains contact with them, though an effective orchestration of the various programmes should be the responsibility of the Education Committee and the FBSI Education Department.
  5. Generally speaking, it seems that information on labour laws and collective bargaining strategies is the primary need of trade union workers. This is as relevant to rank-and-file members who are expected to join the grassroots leadership as it is to local and regional leaders whose exposure to systematic trade union educational activities has been quite inadequate.
  6. On the basis of course evaluation and the programme director's assessment it has been decided to put more emphasis on educators' training in the future. The team concurs with this.
  7. The emphasis of the programme is on training at workplace or local level. This has obvious advantages. In the first place, workers from the same workplace or locality can participate actively in seminars as concrete issues will be discussed. Secondly, they can learn to work as a team. Thirdly, their grassroots base may be strengthened and thus help democratise the functioning of the union.
  8. One problem persists. In seminars organised outside Jakarta it is mandatory that government functionaries participate as lecturers, on topics - often irrelevant - chosen by themselves. Teaching about Pancasila labour relations is also a compulsory subject at the seminars.

### Conclusions and recommendations

In the introduction to our discussion of this project we stated that it would be premature to pass a final judgement on the project's performance now, but this has not stopped us from discussing the continued existence of the project. In the light of the difficult trade union situation in Indonesia, and the evident obstacles to the implementation of meaningful workers' education, we seriously considered the possibility of proposing an immediate close-down of the project. However, a lot of effort has been made to start this project and bring it up to its present level, and even if its development objective is probably unattainable the long-term impact of well-organised and relevant education given to the right people should not be underestimated. It is, therefore, our suggestion that the project should be allowed to run to the end of its second year, at which time its results should be examined critically. If there is still doubt about its usefulness, it should definitely be terminated then.

To improve the project performance and make its impact more lasting the following measures should be considered:

1. The development objective should be revised to make it more realistic and a strategy for how to achieve it should be developed.
2. The programme director should also be given the role of adviser to the FBSI on workers' education policies, and his working situation should be improved to facilitate a smooth operation of the project. Bearing in mind the considerable cost of this post, one should not hesitate to do everything possible to help it function effectively.
3. Emphasis should be given to the educators' programme at a regional level and to workplace programmes. Priority should be given to grassroots development so that local leaders can gain confidence and acquire competence in

dealing with local problems, including collective agreement bargaining.

4. The development of a network of educators is a necessity. Regional leaders should take the initiative in developing such a network across industries within a region so that they can meet to share experiences and generate new methods of teaching and learning.
5. Priorities for training trade union leaders might be re-examined. To give one example: only 20% of the FBSI membership is in the plantation industry, which is vital to Indonesia's economy. The minimum daily wage in this industry was Rupiah 480 (50 US cents) per day in 1983. In the interests of the workers this sector needs priority attention. Similarly, certain regions which are backward in terms of wages and union organisation, such as North Sumatra, Central Java and Bali, deserve special attention also.
6. The main thrust of the project should be directed as suggested above and not deviate in other directions. There are proposals to turn the project into a productivity promotion venture. This should be avoided at all costs. Productivity is an authentic subject among others in the workers' education programmes, and should be kept at that level as far as the project is concerned. There have also been suggestions that the programme director should involve himself in the running of the LO/ICFTU women workers' training programme. We advise strongly against this too: his own programme is so substantial that he needs to concentrate on that alone, though of course women workers and educators have a natural right to a fair portion of his own programme, in addition to the specific women's programme.



## 5. JAMAICA

---

Area: 11,000 sq.km  
Population: 2.3m growing at a rate of 2% a year  
Employment: Work force is 998,800 with 27% unemployment  
GNP: US \$730 per capita (1983)  
Economic growth: 1.8% p.a.  
Debt service as % of exports: 16.2 (1982)  
Inflation: 20% p.a.

Jamaica is one of the largest bauxite producers in the world; this is its main industry and foreign exchange earner, and is principally controlled by North American companies. The industry is experiencing negative growth and due to lack of energy inputs is unable to diversify into primary metal and finished goods. Energy import as a percentage of merchandise exports were 51% in 1981.

Tourism is another important sector and the number of tourists increased slightly in 1983, but imports of consumer goods are needed to service them.

Agriculture is stagnating and substantial imports of food grains continue, nearly a quarter in the form of aid in 1982. The sector is divided into modern plantations growing cash crops, always threatened by the vagaries of world demand and fluctuating prices (viz sugar), and small-scale holdings. Land is distributed unevenly and 30% of usable land remains unfarmed. In 1968 293 farms of 50 acres or more occupied 44.85% of the total farmland while 151,705 farms under 5 acres occupied 14.84% of the land.

34% of the work force is employed in agriculture, 18% in manufacturing, mining and construction, 18% in service industries, 14% in commerce, and 14% in public administration.

In 1981 the top 20% of salaried employees earned 75% of the national income, the top 5% got 30%, while the bottom 20% shared 2%. The proportion of the population in absolute poverty is estimated as 9%. Inflation, which has been over 20%, seems to have abated but unemployment has continued to rise.

Various IMF loans have been made since 1977, imposing a number of conditions on the economy but without, as yet, significant positive consequences. Poverty and violence have at times been a threat to private and public life and have harmed tourism and other strategic sectors of the economy.

#### POLITICAL BACKGROUND

Real power is lodged with the Jamaican Prime Minister, who is the leader of whichever party has a majority in the House of Representatives. The House is elected, by popular vote, for a five-year period. There is also a Senate appointed by the Governor-general of Jamaica (representing the British Monarch). Both the House and the Senate can introduce legislative Bills but only the House of Representatives can deal with money Bills.

There are two main political parties: the Jamaica Labour Party (JLP) and the Peoples' National Party (PNP). The JLP is liberal-conservative and supports the private sector to the detriment of the public sector, with a pro-USA foreign policy. It has been in power since 1980, after a violent election campaign when hundreds of people were killed. The PNP is a social democratic party which works for a mixed economy, stressing self-reliance, non-alignment and anti-imperialism. Political opponents accused the party of Cuban influence while it was in government.

Jamaica is a highly politically conscious country where parliamentary democracy is well entrenched. Different political ideologies are not suppressed.

The economy is under de facto International Monetary Fund control, with emphasis on reduced government spending, wage regulation, and tight monetary control.

#### THE POSITION OF WOMEN

The position of women in Jamaica reflects elements of the history of slavery and colonialism. The pattern of male absenteeism for wage work, dating back to the time of slavery, partially explains the high proportion of women-headed households. The responsibility for being bread-winner and for family care rests heavily or solely on women in a large number of families. This situation no doubt contributes to the impression of a strong and independent female population in Jamaica.

The heavy dependency burden on many women has for long forced younger women into the labour market, leaving elderly women to look after children. In the service sector, in domestic work and petty trading, the proportion of women workers is high. The number of women in jobs requiring professional or higher education is also relatively high. This is particularly the case in teaching, nursing and other public services.

#### THE TRADE UNIONS

Labour Force: 998,800 (1983) - the extent to which the labour force is unionised is a matter of some dispute. The membership claims of the Jamaican trade unions total 349,000 but LO-Norway believes the total to be about 168,000.

### National Trade Union Centres

There are four major trade union centres:

1. Bustamente Industrial Trade Union (BITU) claims 159,000 members (the LO estimates no more than 65,000).
2. National Workers' Union (NWU) claims 152,000 members (the LO estimates 65,000).
3. Trade Union Congress of Jamaica (TUC) - 20,000 membership claimed by TUC.
4. Jamaican Association of Local Government Officers (JALGO) - 18,000 membership (according to the LO).

BITU and NWU are affiliated to the ICFTU.

### Political Affiliations

Jamaica is dominated by a system of political unionism. A small number of families have also played a prominent historical role. BITU supports the present ruling party, the Jamaica Labour Party (JLP). NWU is a wing of the Peoples National Party (PNP). The TUC manages to be regarded as both politically independent and supportive of the PNP. JALGO is politically neutral.

The two dominant centres, BITU and NWU, are rivals in most economic sectors. When one union gets sole bargaining responsibility in one plant, all workers in that plant are generally regarded as 'members' of that union, whether in fact they actually join the union or not.

Effects of Government Policies and Legislation

Industrial relations are subject to the Labour Relations and Industrial Disputes Act of 1974, which makes it possible for the government to prohibit industrial actions which are deemed harmful to the national interest.

The 1974 Act, coupled with a politico-economic climate of IMF-induced austerity programmes, hampers the organisation and activities of the trade unions to a certain extent.

INDICATIONS FOR THE FUTURE

Jamaica is a relatively free and democratic society with a high level of political consciousness. Given this situation, it is possible to predict a level of inter-trade union cooperation on selective issues. Trade union leaders are, by and large, open-minded and maintain a close relationship with workplace activists. They maintain that this has been and should remain a distinct strength of the trade union movement in Jamaica.

JOINT TRADE UNION RESEARCH DEVELOPMENT CENTRE

---

5.1 HISTORICAL BACKGROUND

The oil crisis in 1974 put considerable pressure on third world countries like Jamaica which were dependent on the import of oil. Balance of payments problems and reduced foreign investment led the Jamaican government to seek economic and technical assistance from abroad, in particular from the UK, Scandinavia and Canada.

A development aid agreement was discussed by the Prime Ministers of Jamaica and Norway in 1978, including a joint approach by the leaders of the four main trade unions. Although the unions had different political affiliations they agreed they had common interests on major national and branch issues. One issue was the need for training union representatives at different levels of the movement, another the need for systematic research into wages, employment conditions, and other matters relating to collective bargaining and socio-economic policy.

An outline for a new trade union and research centre was worked out and brought by the four union leaders to the Prime Ministers' meeting in Jamaica in 1978. This was appreciated as an event of some national significance. A joint team of trade union and employees' representatives visited Norway in 1979. The Norwegian LO agreed to be the sponsor of the Centre and a formal contract was signed in 1980.

An adviser from the LO stayed at the Centre for the next two years.

In the late 1970s the four trade unions found themselves on different sides in the violent political struggles in Jamaica between the People's Party and the opposition Labour Party. These culminated in the 1980 general elections and a change of government in 1980. This political confrontation was one reason why it took so long to get the joint trade union Centre established, and contributed to the inefficient running of the Centre in its early stages. The resignation of the first Director gave the opportunity for a fresh start in 1983. Developments since then are described and discussed under the following chapters on education, research and communication.

## 5.2 EDUCATION PROGRAMME

---

### Objectives and guidelines

The rules governing the JTURDC state that the function of the Centre is to "promote the education of the worker by way of workshops, lecture-discussions, dissemination of published material, action research involving workers, and to provide advice and information which will be used by the individual unions to determine their own policy and modus operandi".

Of the three main activities of the Centre, the education programme has been the core of its work. A regular programme of different types of courses has been established; course materials and case studies have been developed by the staff (two educators), and the capacity of the education department is now fully exploited with approximately 350 delegates attending the courses annually. There is continuous cooperation between the three activity areas, but controversies can easily arise between the participating unions over joint research findings, and an inadequate staffing and resource allocation for research activities have delayed the development of a strong mutual relationship between education and research.

In the guidelines laid down by the Education Committee on 12 October 1982, the Committee strongly recommends "that the initial implementation of this programme should be based on economic and social education and 'hard core' trade union training".

Economic education should help workers understand how national and international economies function so that they can play a more active part in determining their social progress, participate in economic development and enjoy the benefits of economic growth. Social education should examine the evolution



of the trade union movement, nationally and internationally, and stress the importance of trade unions within the ambit of a democratic society. 'Hard core' trade union training has the primary aim of developing leadership qualities and communication skills for the appraisal of members' needs and the identification of solutions to these needs. The objective is to develop and maintain the strength of the union at the workplace.

The objectives of the education programme are thus very broad. In the actual courses the weight has been strongly in favour of 'hard core' trade union training. In the guidelines, the Committee strongly emphasises that the JTURDC Education Programme should be part of a coordinated approach to trade union education. It should complement the educational activities of individual unions and the more advanced courses run at the Trade Union Education Institute (TUEI) of the University of West Indies. It is envisaged by the Education Committee that the 'model' comprehensive education programme would bring delegates into a carefully planned sequence of activities which would include (1) induction training sessions at their unions, (2) basic training at the JTURDC, (3) specialised courses at the JTURDC, and (4) advanced training at the TUEI. The overall objective of the programme is to facilitate the process of recruitment and selection of trade union officers from delegate ranks.

#### Strategy for Implementation

A strategy for implementation of the education programme over a three-year period was approved by the Board of Governors of the JTURDC in January 1983. The main elements of the strategy for 1982-83 were:

- Assistance for the four unions in developing an induction programme of two-day courses for new or inexperienced delegates.

- The planning and organisation of a two-week basic delegates' course for a maximum of 20 delegates per course.
- The training of trade unionists as course tutors through the 'teaching skills and methods' courses of the Commonwealth Trade Union Council (CTUC) project at the Centre.

The main strategy elements for 1983-84 were:

- The design and production of four 'follow-on' courses of 5 or 10 days' duration, to cover such topics as grievance handling, contract negotiation, health and safety at work, organising members' education.
- Close liaison between the Centre and the TUEI concerning the topics covered in the two institutions' courses, with the TUEI courses functioning as an advanced follow-on stage for delegates.

The JTURDC Board also approved the integration of the women's programme into the general education programme.

#### Project Performance and Progress

The original intention of the education programme was to develop five main spheres of activity: basic intensive introductory courses for delegates; two-day seminars on specific topics or for particular groups of workers; evening sessions; special programme for women; development of resource material.

During the first year, up to August 1982, the Education Department concentrated on the first two aspects: evening courses did not take off and the programme for women was delayed for over six months because the position of coordinator was vacant.

During the first year 12 courses were held: 4 two-week basic intensive courses for delegates and 8 two-day courses on various topics. Approximately 230 delegates attended the courses, the four participating unions sending between 50 and 80 delegates each. In addition the Centre introduced a Trade Union Week with a number of activities for schools - in particular for history teachers and students, who are exposed to trade union history in the high school curriculum - and two open days at the Centre for the public.

1983 saw an administrative reorganisation of the JTURDC following the termination of the post of Director at the Centre. The day-to-day administration and implementation of the programme of activities remained the primary responsibility of the technical staff assisted by the sub-committees and the Chairman of the Board, while the Board of Directors were responsible for determining broad policy guidelines. In reality it meant that the running of the Centre made heavy demands on the attention of the Senior Education Officer.

From 1983 on, the basic courses for delegates continued but in a reorganised form, after critical assessments by the Education Officer and the CTUC adviser. Course materials were pre-tested at 4 courses out of 7 held in 1983. The Education Department also diversified its programme with the implementation of three sessions in a new Officer Training Programme that has been continued in 1984. The recent emphasis of the Education Department's activities has been on the continuation of course material development, pre-testing of new courses, introduction of 'Guides' on various topics (e.g. Noise at Work) for trade union members, and a certain decentralisation of courses to areas outside Kingston.

The women's programme, comprising three-day induction courses and two-day special courses (on Women and the Law, Family Planning, and Money Management), was activated in 1983.

Assistance to the individual unions has not however taken off as planned. A Methods Course was held at the Centre which was intended to train tutors to run induction courses in the unions, but only two unions, the TUC and the NWU, have held one such induction course each. The Education Department has therefore under-spent its allocation for assistance to union courses.

## Observations on the Education Programme

The following observations can be made, bearing in mind the original objectives and strategy for implementation.

### i) Scope

The scope of the programme has been narrowed. It concentrates on basic courses for delegates and on follow-on/specialised courses. The induction courses to be run by individual unions with assistance from the Centre have not had much union support. Neither has cooperation with the TUEI developed as planned in order to integrate the Centre's causes with the more advanced courses of the TUEI.

We were pleased to see that the women's programme had got under way after some initial delay. It is unfortunate that it is on a limited scale as the individual unions do not have many such courses.

### ii) Contents

The basic and follow-on courses focus more on 'hard core' trade union training than on economic and social education, as originally planned. This was explained by the Education Officer as a deliberate choice for the following reasons:

- there is an urgent need among union delegates for basic skills and knowledge in order to organise at the workplace;
- economic and social education is a much more controversial issue than specific trade union education;
- the development of economic and social education material requires a greater input from the Centre's Research Department.

The Education Department nevertheless hopes to introduce more socio-economic topics in follow-on courses, since there is a

growing pressure from delegates to cover more economic and political issues.

A fundamental reorientation of the courses took place in 1983 reducing the number and diversity of topics and making the courses more internally consistent. The follow-on courses, however, still reflect a rather fragmented approach. Although these courses were designed to be flexible, the topics appear to have been selected in an ad hoc manner rather than in response to expressed needs.

iii) Methods and materials

From being predominantly lecture-based, the courses are now more activity-based and student-centred. This method rests on the assumption that people learn more by doing or discovering things for themselves, and that trade unionists learn better through sharing their experiences.

Within the limits of what can be accomplished with a staff of two Education Officers, the Centre has now revised its materials, with the assistance of the CTUC adviser, so that they fit in with the more participatory methods. The staff has drafted case studies based on real incidents, and revised, narrowed-down course materials have been tested on several of the basic courses.

iv) Benefits to participants and unions

A review of the course evaluations by delegates suggests that on the whole they were enthusiastic about their participation. A positive opinion on the general benefits of sending delegates on the courses was also expressed to the team by the four individual unions. It is a general impression that delegates who have attended courses become more active in their unions and in communicating with their fellow workers. At the same time it is observed that a number of delegates are 'lost' after training, due to their quicker promotion than might otherwise

have been the case. It is generally agreed that the mixing of delegates from the four unions diminishes inter-union resentment, and contributes to the delegates' perception of themselves as workers with common problems rather than as members of competing or antagonistic unions.

16 delegates (5 women, 11 men) made the following comments on the basic course:

- The course teaches a method for the presentation of issues to management.
- The course increases one's systematic understanding of workers' problems.
- The course and the material handed out to keep equip the participants with tools to deal with workplace matters.
- One learns to be more aware of both workers' and managers' attitudes.
- The course helps one to overcome fears of dealing with people. Fellow workers have more confidence in one.
- Reactions to the teaching methods were very positive: "Delegates learn from each other"; "Our different background is a strength - sharing different experiences"; "We learn to be servants of the workers, not to be bigheaded"; "Simple and easily understandable language used by tutor and in course material".

After attending the course half of the delegates had arranged lunch-time or evening meetings at their workplace for groups of between 20 and 250.

The same delegates made the following suggestions:

- Basic mathematics should be included.
- Courses should be designed and run for rank-and-file members, not for delegates alone. A number of delegates do not return to work and use their courses.
- There is a big need for follow-on courses or refresher courses to keep up motivation.

- Unions could do much more for workers: housing is an urgent issue.
- There is a need to be brought up to date on general issues affecting the country.
- The Government should put more emphasis on workers' education, not only on management courses. Workers are willing to have deductions made from their wages for workers' education purposes.

v) Problems/weaknesses

The Centre is aware of a number of weaknesses in the education programme which have not been fully overcome:

- The Education Committee of the JTURDC no longer functions and there is therefore no group, outside the Board, which has responsibility for overseeing the Education Programme. The staff would benefit from the re-establishment of this Committee to provide a forum for their views, general guidance, and to assist in the monitoring and evaluation of the education programme. It would also improve the links between the individual trade unions and the JTURDC.
- The programme was largely developed in isolation from the education programmes of the four unions and the TUEI. This is partly a consequence of a lack of resources at the Centre but also reflects the fact that a sufficiently high priority is not given to the education programme by the four unions. It is also important for the Centre to be looking further ahead than it appears to be at the moment, because a crucial minority of participants will soon be needing more than the Centre can offer now. These students might find themselves on one of the TUEI courses without a link being made by the JTURDC.
- Insufficient support by unions for the programme is reflected in (a) the level of attendance on some courses, (b) the ad hoc selection of delegates with little



attention paid to the aims of the courses and (c) the tendency to send the same delegates.

- The education programme continues to be implemented without the vital support of an active research department. Some progress has been made in cooperation between the two departments over the development of resource material on selected topics and case studies, but the level of cooperation leaves much to be desired.

## Recommendations

The observations above lead the team to make the following suggestions:

1. In its three years of existence the education programme has been sufficiently flexible in the planning and implementation of basic courses, follow-on/specialised courses, and women's courses that the programme has considerably improved since it was initiated. It is recommended that continued support be given to the programme in order to strengthen its development in a positive direction.
2. In order to assist the education programme to gain its own dynamism and to maintain its flexibility, the following suggestions are made:

- i) Scope of the programme

Attempts should be made to develop a full education programme based on an appraisal of the needs and resources of the education departments in the participating unions, in the Centre and elsewhere. This requires active participation not only by the Centre but by the unions themselves, and other agencies. Unless motivation for this can be raised within the unions there is a danger that the education programme will continue to suffer. Coordination with the TUEI must also be pursued.

The JTURDC is unique in the Caribbean with its three-point focus on education, research, and communications. Suggestions have been made on various sides that the JTURDC should direct itself more towards the region. The team's observations suggest, however, that the Centre is still in its formative stages, without a full staff or adequate funding. Under these circumstances the team suggests that the efforts of the Centre must for some time be concentrated on strengthening its activities locally. The development of more permanent regional

cooperation should be postponed, while ad hoc cooperation on specific topics of regional relevance should naturally be encouraged.

ii) Methods, contents and materials

The reorganisation of the basic delegates' course has greatly improved it both with regard to content and methods. It should ideally be a continuous process as the course organisers respond to the comments of participants and to changing factors in the situation of the unions and the country at large. It is important that the Research Department, with access to relevant data and new studies, should cooperate actively with the Education Department in this process.

The updating and development of suitable materials is a key element of the training programme. Here the contribution of the Research Department is especially significant. The teaching staff are under such pressure that they have little time to prepare teaching materials, or to liaise with unions and lay groups which might be able to contribute relevant materials.

The evaluation team realises the difficulties involved, under the present economic and political strains in Jamaica, for the four unions involved to reach the necessary degree of cooperative understanding and commitment to the joint education programme. We nevertheless strongly suggest that the Board of Governors, the Education Committee (if re-formed), and the Education and Research Departments keep the relevance of the education programme as a standing item on their agendas.

iii) Monitoring and evaluation

We believe that a systematic monitoring and evaluation of the programme would greatly assist in its development and responsiveness to needs. A proposal for an evaluation system

for the basic course has been presented as a research proposal by the Education Officer.

iv) Education staff

With the reorientation of courses towards more participant involvement and away from lecturing by 'experts' the work load has been increased on the education programme's two officers. One is responsible for the basic course (plus much Centre administration), the other for the women's programme, for follow-on courses, and also for the Centre's documentation material. The Education Department is working to its full capacity, which means that the addition of new topics or courses is impossible without the recruitment of more staff.

Suggestions have been presented by the Education Department that provisions be made for the identification of trade union officers who could offer advice for the development of resource material and act as tutors during courses. The team fully supports these suggestions, and the development of the existing methods courses and officer training courses. The successful establishment of a 'tutors' panel' is again dependent upon a positive response by the unions, which we hope would be forthcoming since these tutors would presumably divide their time between courses run by the Centre and courses run by their own organisations.

v) Facilities and equipment

The Centre library seems to be developing well as a general resource but does not seem to be used nearly as much by course participants as by sixth formers and university students. The audio-visual equipment has been severely under-utilised, partly because no-one had the skills to use it and partly because of a lack of audio-visual materials to show. This has been partially put right because one member of staff has now been trained to operate the equipment. However, there is still a

need to acquire suitable materials, some of which could be produced in Jamaica and others purchased from elsewhere.

### 5.3 RESEARCH PROGRAMME

---

#### Background

The inclusion of research in the scope of the Centre was motivated by several factors. First, the unions lacked wage statistics and other basic data for bargaining purposes. Second, some types of research were important for policy studies and relations with government and other agencies. And finally, education, communication and other services to be offered by the Centre needed to be supported by relevant and reliable research.

The leaders of the founding unions saw the advantages of combining education and research when they made their study tour to Norway in 1978, but it was more difficult to get the Centre's research department started than the various educational activities.

Since the hiring of a new research officer in 1982, certain progress has been made in the following areas:

- An Economic Bulletin has been produced, with 3-4 issues annually, covering major economic and social policy matters. Material presented is based on policy papers written by the staff and others.
- Tribunal award summaries have been published, i.e. labour court rulings for the information of bargaining agents, union members etc.
- Company profiles and other forms of data from enterprises have been made available for bargaining and other trade union purposes.

- A comparative study has been made of collective agreements.
- Monthly workshops are held on critical policy issues like the effects of devaluation, legal changes etc. for invited specialists and union leaders and members.

### Observations

As indicated above, the research concept has been used to mean fairly simple studies of concrete and relevant trade union issues, like wages, working conditions, employment and socio-economic conditions of employees. This seems to be a wise way of building interest and support for an extended programme. The next step is already being initiated by the so-called 'company profiles', case-studies to be used primarily for bargaining at enterprise level (a student assistant is helping to write these).

The evaluation team received a favourable impression of the quality of the research work, the main problem being its very limited nature.

Limited resources have made it impossible for the research officer to use the data for more sophisticated analysis. It has also been impossible, for the same reason, to use the initial research as a basis for follow-up studies on different levels - national, branch and enterprise level.

Both the educational and communications activities are suffering from the weak research function. The critical factor is that only one research officer is employed with very limited professional and administrative assistance. Under these circumstances the intended professional profile of the Centre will suffer. In a few years, the quality of services rendered by the Centre may decline, and the challenge and learning opportunities necessary to keep qualified staff will not be there.

The understanding and the support for research activities among union representatives is increasing, but much remains to be done before new and necessary steps are taken to safeguard the quality of the Centre's services.

The presentation of research findings and related material in the Newsletter, in monthly workshops and otherwise is very good. It could in fact be used as an example by other research and training centres, also in Norway.

Even the limited amount of research done so far has been an important element in building a common platform from which the unions can act jointly on important issues. However, this is a highly sensitive matter, and the staff and the Board will need considerable time and wisdom to maintain and develop a co-ordinated effort on research.

The evaluation team raised the question of strengthening the research functions of the Centre with all the four unions involved. The responses were mixed, since there are some aspects of research which may be difficult to be supported jointly by unions with different political affiliations. On the other hand, some unions are in favour of stepping up concrete forms of research, e.g. on health and safety, case studies of bargaining and grievance procedures and relevant industrial relations issues. Alternative research tasks and forms of collaboration have been explored with the unions, giving the staff the opportunity to clarify what types of research could be carried out, what purposes the research would serve, and how it could be used by the unions. An increased interest in research has resulted from this, but the Board has not been able to give any clear guidelines and to mount the necessary support for increased research activities.

The team also explored with the research officer ways of extending the research functions, and integrating these with the major training function of the Centre. We give two illustrations of ways in which training might develop:



Members of the team visited a brewery in Kingston, and found that some of the trade union representatives, who had taken courses at the Centre, were interested in exploring how they might collaborate further with the Centre. One suggestion would be for them to compile descriptions of their work environment and bring these into the Centre for training purposes. After a course, participants could follow up with data-gathering and participate in the planning and execution of work-place improvements. Material from such action cases could in turn be accumulated by the Centre and be used as a basis for policy recommendations within unions and at a national level.

At the central post office in Kingston, union representatives and a staff specialist in the training department also expressed interest in research collaboration with the Centre. Here, action research had already been attempted in 1980, in connection with training and reorganisation of work required by the introduction of new technology. This attempt was stopped because of the political unrest during the election campaign, but it could be continued if the Centre had the personnel, and if a training specialist in the postal service was given the necessary time.

Another possible extension, and diversification, of the research function would be the introduction of a consultancy/advisory service. Consultation is already part of the existing educational and research function, but in a very limited way. When the research department and the general administrative structure are better established, the Centre should consider how to extend the advisory service. Advice on health and safety and the work environment are relevant areas, as are training/education, grievance procedures, and worker participation. This service might also help finance the Centre, though not without some initial investment to increase the capacity of the research department.

Recommendations

- i) The necessary support should be sought and allocation of resources be made as soon as possible by the Board of the Centre to extend work on 'company profiles'. This would mean making more complete case studies of enterprises covering not only wages and financial matters but also the organisational structure, employment and working conditions, the work environment, grievance procedures, training etc. Two or three good case studies in both the private and public sector would be a realistic target for 1985. The active involvement of union and management representatives in each of the case studies would be essential.
  
- ii) Further integration of educational and research functions should be encouraged. An evaluation study of existing courses has been started by the senior educational officer. This deserves full support. Data from ongoing courses (e.g. the health and safety course) can be collected and analysed as part of the training and also be used as a basis for case studies at enterprise level. This would mean that union members are given some basic understanding of what kind of research could be useful to them. It could also be a first step in preparing them to take an active part in collecting research data and to utilise the results.
  
- iii) Extending the network of professional collaboration is both necessary and possible. A first step has been made by employing a student assistant. This should be extended in 1985 by one or two more students (advanced level) to assist in case studies. Qualified guidance for these students should be sought from the University of Kingston and if possible from specialists in public enterprises.
  
- iv) Budgetary and other local restrictions make it essential to seek additional support, preferably in Canada, the U.K.

or Scandinavia, to offer at least one research fellowship at the centre. This would only be a minimum increase in the research capacity necessary to develop a viable research programme. Another possibility would be to seek financial and professional support for two outside researchers to spend a couple of months at the centre, if possible in 1985 and in 1986. They could help to run a workshop in action research and participate in new small research jobs to be done before and after the workshops.

#### 5.4 COMMUNICATIONS SERVICES

---

##### Observations

These services are an integrated part of the education and research departments, but they are also established as an independent and important function of the Centre. A specialised information firm does much of the work on contract. The director of the firm, even though only engaged part-time by the Centre, brings in a high level of competence and professional judgement. She and the leaders of the education and research departments represent the professional core group of the Centre.

The major areas of communications services are:

- The quarterly Newsletter
- Continuous coverage of the Centre's activities and special events in national media
- The library (with the Education Dept.)
- Quarterly publication of Tribunal Award Summary
- The quarterly Economic Bulletin.

The Newsletter goes out to all union members who have used the Centre, as well as to union officials and other contacts. The Tribunal Award Summaries and Economic Bulletin, produced in conjunction with the Research Department, are more specialist publications. The number of regular publications is impressive, as is their wide dissemination, including the national media. Presentation is non-technical and easily understandable. The Newsletter and the Economic Bulletin are well-prepared productions with imaginative lay-outs, and a refreshing array of contemporary topics.

All in all, the communications wing of the JTURDC is a commendable effort in educational and research activities. It is not out of place to mention that this wing is qualitatively and professionally equipped, despite man-power limitations, to handle work with high potential.

## 5.5 GENERAL OBSERVATIONS REGARDING THE CENTRE AS A WHOLE

---

### The organisational structure

The structure of the Centre is not a stable one at the moment. A new executive director has not been appointed. The lack of resources has created a need for the staff to share professional and administrative tasks and to fulfill different work roles simultaneously. This may be the best solution for the time being, but it does involve risks. The work load is too high. The three leaders of the main functions - research, communications, and education - work well together, the latter one acting as the executive head. If policy matters need quick handling, then difficulties may arise both among the three and between them and the Chairman of the Board. The Chairman is handling a sensitive political situation which has required and will continue to require a lot of work.

There has been continuous contact between the Centre and the LO adviser in Oslo to prevent a crisis because of the unstable organisational structure. If any one of the core staff decided to leave the Centre under the present conditions this would create a crisis which must be avoided.

The evaluation team has insufficient knowledge about the situation at the Centre to recommend a concrete solution to these problems. Our impression of the way the Board is operating leads us to understand that the previous Chairman, who had been involved with the Centre from 1978 onwards, had acted in a double role. After the director left in 1983 his role was partly filled by the leader of the education department, partly by the Chairman of the Board. The present Chairman may also be able to take on this double role, but in the long run this is not a satisfactory solution. The

Chairman's role is such a vital one that we should think it is more than enough for someone who is also carrying responsibilities in his own union.

Several solutions are possible, but none of them is easy to apply under the present financial constraints:

- One alternative is to promote one of the staff to the position of director. We are not sure this is wise at the moment, if for no other reason than that it would take time to replace an important professional person.
- Another alternative is to have a rotating administrative leadership for limited periods of time (two or three years). This would be more or less to prolong the present situation, but with the advantage of a more clear definition of responsibilities. If this is going to work at least one more person must be hired to do professional work, probably in the education unit.
- A third alternative is to get a new full-time director from outside. This would be very difficult unless it was one who had the full support of the board and who was trusted personally and professionally by the staff.

Until a more satisfactory solution is found it may be useful to choose a small working committee within the large Board. This committee could be a help to the Chairman and the acting executive head to sort out short-term problems. In that way the Board would be able to concentrate more on policy issues.

#### The financial situation

The evaluation team got the impression that the financial resources put at the disposal of the Centre were used effectively once the difficulties during the first two years had been ironed out.

However, there are recurrent problems of liquidity because the government and the union contributions are paid late. When the team pointed this out to the local sponsors we did not get the satisfactory answers, at least not from the government side. It is correct of the LO to continue to put pressure on the Jamaican counterparts to solve this problem.

It also seems appropriate for the LO to continue gradually reducing the outside support. The LO share of the running costs are now stipulated as approximately 63% in 1984 as against 72% in 1982.

Even if the short-term financial problems are solved, the basic problems remain. The Centre is simply not firmly enough established to become financially self-reliant in the next two or three years. Neither the LO, the Board, nor the staff can be blamed for this under the existing economic crisis in Jamaica.

#### Conclusions and recommendations

The recommendations which the team can make after a one-week visit are necessarily limited. They are expressed under the separate chapters dealing with the different units of the Centre.

To sum up:

- i) Continued support is justified on the basis of the quality of the services offered by the Centre and by its developmental role in Jamaica.
- ii) The educational unit is, and should continue to be, the major activity of the Centre. The following suggestions should be considered:
  - To develop further a full education programme both within the Centre, and in collaboration with different unions and the University Trade Union



Education Unit. The motivation and support of the unions need strengthening.

- A careful testing should be continued to see what special educational services can be rendered by the Centre in the Caribbean region if so required. This outside experimentation could also include visitors from other developing areas. Great care must be taken to prevent outside engagements interfering with the primary tasks in Jamaica.
  - Further evaluation and updating of the ongoing courses (both in form and content) deserves the continued attention of the staff and the Board.
- iii) The research unit can best be strengthened through a closer integration with the educational activities. We also suggest that the work on "company profiles" be extended to build up more comprehensive enterprise case-studies through an action-research approach. They should start with work-place issues and build an information basis for bargaining and policy recommendations. Assistance from visiting advisers will be necessary.
- iv) The communications unit is already strong and should continue to be supported to utilise its capacity to the full.
- v) All the above suggestions depend on the recruitment of at least one or two staff members to be placed in either the research or the education unit, depending on how the two units are integrated.

General assessment

- The evaluation team has included more detailed material on the Jamaica Centre than on any other project we studied partly because it is the largest and the most important bi-lateral project, and partly because the LO and the Centre itself were able and willing to furnish us with all the information we could handle.

We also include a more detailed assessment because this project is the only one among those we evaluated where the highly complex and sensitive task of starting a long-term development effort has been taken into account from the beginning - where the parties involved have initiated joint plans and actions as part of a long-term development strategy. This strategy started with a central idea backed by the unions and supported by the two governments, and then developed step by step through professional and political action guided by a set of common values.

- This project came into being during a period of political upheavals and severe economic crisis in Jamaica. Indications were given, to be communicated to the sponsors in Norway, that the Centre may in several instances have been helpful in preventing or sorting out controversial economic and social conflicts.

It is encouraging to find (on the front page of the centre's Newsletter, December 1984) an announcement by the Press Association of Jamaica that its national award is given to the Trade Union Movement in recognition of its contribution to the development of Jamaica's national life.

Obviously there are problems that remain to be solved, but we believe that the Centre and the sponsors in Norway have learned how to proceed in tackling these problems. This problem-solving capacity and the development strategy are indeed important results of a project after three to four years of operation.

Although the establishment of the Centre has been the result of factors specific to the Jamaican situation, we outline below the steps which led to its development in case they serve in some ways as a model for similar initiatives:

- A joint national initiative was taken by four Jamaican unions with overlapping but also conflicting interests. The main idea was to establish a centre which could furnish the unions with basic information, understanding and skills to handle bargaining issues and socio-economic policy problems.
- A study group of union and employers' representatives visited Norway. Consultations took place between the two countries, and professional advisers to the unions of both countries were involved in drafting proposals for the new Centre. Finally high-level political discussions took place before the plan was actually launched.
- The LO secured the support of the Norwegian unions and of NORAD. The financial and organisational plans were flexible, but still long-term, aiming at the self-reliance of the Centre.
- A slow build-up took place, starting in 1980 after two years of preparation. Organisational as well as financial and professional problems were numerous, partly for internal reasons at the Centre, partly because of the political and financial crisis in Jamaica. A full-time adviser from the LO at the centre was necessary, but no attempt was made to take over the responsibility of the unions. Only after three years did the strategy emerge which now exists, a strategy which is consistent and closely related to the current Jamaican context and to an international network of development cooperation.
- A major problem for the Centre now, and for the next two or three years, is that it has not reached the necessary

size either in educational or research services because the financial resources are insufficient. Another major problem is the unstable executive structure, also partly a result of financial constraints.

It will still take some time, perhaps two or three years, before the centre can achieve the necessary level of professional and financial self-reliance.

## 6. ZIMBABWE

---

Area: 391,000 sq.km.  
Population: 8m, growing at a rate of 3.5% a year (1982)  
Employment: work force is 3,2m with 21% unemployment  
GNP: US \$850 per capita (1982)  
Economic growth: 1.5% p.a. 1970-82  
Debt service as % of exports: 9.2 (1982)  
Inflation: 8.4% p.a. 1970-82

Zimbabwe is a fertile land with a variety of crops - food and cash - and a modernised agricultural sector. Mining is also an important part of the economy, and the industrial infrastructure is well developed. A major problem, however, is its dependence on ports in Mozambique and South Africa as it is land-locked; political as well as economic changes have destabilised the economy.

Its growth rate has diminished dramatically since 1982 and of particular concern has been the fall in the contribution of agriculture to the GDP, caused in part by drought over the past three years. Not surprisingly, in view of Zimbabwe's history, land distribution is very uneven: approximately 5,000 families own the best farmland, of whom 500 are Africans with an average holding of 250 acres, and the rest whites with at least 2,000 acres each. Much of the rural population has been re-settled on communal land with small holdings of poor quality.

The economy is heavily dependent on transnationals which dominate plantations, mining, industry and trade, and are not conducive to a policy of self-reliance.

Minimum wages have been enforced by the government but inflation, now running at 20%, is devaluing the benefits. 20% of the working population receive over 50% of the wages;

expatriates are still used in considerable numbers because in spite of high unemployment there is a shortage of skilled manpower. Few new jobs are being created, and in 1982-83 some 28,000 jobs were lost, over a quarter of them in agriculture.

The deficit in the current balance was US \$706m in 1982, and the outstanding external public debt was US \$1,221m, a heavy burden in terms of interest payments.

#### POLITICAL BACKGROUND

Zimbabwe gained legal independence in April 1980 with the ZANU-PF leader Robert Mugabe as Prime Minister. Until 1984 the smaller ZAPU-PF participated in the national government but after its recent expulsion from government there are indications that Zimbabwe may be turned into a one-party state, perhaps in 1989, at the expiry of the Lancaster House agreement.

Apprehension has also been expressed that dependence on the International Monetary Fund (IMF) may lead to cuts in food subsidies, wage-restraints, and a curtailment of social services and public expenditure.

South Africa's visible and invisible role in Zimbabwe's economy continues to be vital and may also prove to have a bearing on the future actions of the Zimbabwe government.

## THE POSITION OF WOMEN

The period since Independence is still too short to have permitted radical changes in the position of women in Zimbabwe. The liberation struggle and achievement of Independence have, however, laid the foundation for breaking with the racialist regime's subordinating policies towards women. The new government's emphasis on rural development, education and health will hopefully open new perspectives for women.

There is not yet much information on the situation of women in Zimbabwe, as they have not been drawn much into the 'modern' sector for which statistics are collected. Women are arguably the poorest and most neglected section of the population. In the wake of internal male migration for wage work, the women left behind in the 'reserves' had to take on additional tasks otherwise performed by men. The poor land in the 'reserves' meant a struggle to feed the family. Little surplus could be grown to be sold for cash, and women had to rely on pitiful remittances from their husbands and find or create some income-generating activity. Statistics do not show how many women are engaged in small-scale income-generating activities in the informal sector, but activities such as vegetable-growing, poultry-rearing, and handicraft-production are widely practiced.

The Manpower Survey of 1981 showed a total number of 41,000 women in formal wage employment and professional careers, half of them in clerical and related jobs. Even with a socialist regime, Zimbabwean women today are faced with similar problems to those experienced by women in other African countries: the so-called 'integration of women into development' has been equivalent to the relegation of women to the subsistence sector in agriculture and low paid jobs in manufacturing and services. It is only when the structural inequalities have been removed - like the minority status of women and their unequal access to land, resources and jobs - that real improvement in the lives of women has been accomplished.

## THE TRADE UNIONS

### Labour force:

Approximately 1½ million - about 200,000 are unionised.

### National trade union centre

The Zimbabwe Congress of Trade Unions (ZCTU) is the only national centre, founded by government initiative on 28 February 1981 at its first Congress, which was attended by 82 unions representing all of the previous federations and unaffiliated unions. Historically, the labour movement had been fragmented regionally and politically as well as along racial lines. At independence, there were at least five centres of varying size and significance, but after a few unsuccessful unification attempts originating within the union movement itself, there was no real opposition to the formation of the ZCTU.

### Political affiliation

Although the ZCTU is not affiliated to any of the political parties, it is generally believed that the influence of ZANU is considerable, but it is worth mentioning that some of ZCTU's stronger affiliates have their headquarters in Bulawayo, the main centre in Matabeleland and a strong-hold of Joshua Nkomo's ZAPU party.

### The present situation

Recently, in fact after our team visited Zimbabwe, the leadership of the ZCTU was suspended, and a government administrator, an Industrial Relations Officer from the Labour Office in Bulawayo, was placed in the office of the ZCTU in Harare to conduct the daily business. As far as we understand, the ZCTU Education Department is the only operating unit at



present. In most of the affiliated unions, however, business continues as usual.

Weak leadership has always been a problem for the ZCTU, accentuated by the fact that potentially good leaders have been held back. In addition, there have been rumours of corruption and favouritism. These rumours seem to have been confirmed by the government's action. There will probably be no change in the situation until elections can be held at the next Congress of the ZCTU, which may take place early in 1985.

#### Indications for the future

Provided the ZCTU situation "normalises", future developments in the trade unions will no doubt be influenced by the forthcoming Industrial Relations Bill which was at the stage of its fifth draft when we visited the country. If enacted, the Bill will strengthen government control over unions but it may also contribute to the strengthening of the unions themselves through a compulsory check-off for union members and a "fee" for non-union members, and through the affirmation of the principle of industrial unions.

This should help to ease the financial constraints on the ZCTU: At the moment it has difficulties in financing any of its activities, including the rent for its premises which is paid by external donors.

#### ZCTU workers' education activities

Even before Independence individual unions ran workers' education activities sponsored by various ITS's and, to a certain extent, by the ICFTU. After Independence the country was literally flooded with agencies from east and west offering their assistance. The confusion was considerable, and at one stage the ILO was requested to assist in coordinating the aid

activities. It has been doing this within the limits of its financial resources, but it is probably the Commonwealth Trade Union Council (CTUC) which has contributed most to organising and assisting the ZCTU Education Department which came into being early in 1983. Some educational material has been produced, but the most important achievement is probably the production of an annual workers' education programme, which is presented to donors who choose from the programme those activities they wish to sponsor. Theoretically, this would secure some kind of systematic approach, and a number of activities have actually been carried out. CTUC assistance to the ZCTU is now being scaled down, but it is expected that the ILO will send in an expert equipped with some funds as soon as the trade union situation eases. The ICFTU has a resident representative in Zimbabwe who is very active in the field of education and training. The African American Labor Center and the Friedrich Ebert Stiftung are also permanently represented. To our knowledge, the Norwegian Trade Union School activities were not taken into account in the ZCTU annual programme.

6.1 EDUCATIONAL AND ORGANISATIONAL ASSISTANCE TO ZIMBABWE  
LEATHER, SHOE & ALLIED WORKERS' UNION

---

Project background

The original project description requested assistance for organising and training members of the Zimbabwe Leather, Shoe & Allied Workers' Union, through the relevant International Trade Secretariat - the International Textile, Garment & Leather Workers' Federation (ITGLWF). The LO made a grant of approximately US \$20,000 in 1982. This has not yet been spent, as assistance was also received from FNV-Netherlands which has covered the costs of the programme to date.

The experience of the first year's work has led the ITGLWF to propose a substantive change in the scope of the project so that its focus is not only on the one previously named union but on the four unions which operate in the textile industry. The point of this would be not only to make courses available to a wider range of trade unionists, but to help bring the unions together.

The textile and clothing unions

The textile and clothing industry is a sector of major importance to the Zimbabwean economy. The main unions which organise in this industry are the Zimbabwe Leather, Shoe & Allied Workers' Union (ZLSAWU); the National Union of Clothing Industry (NUCI); the United Textile Workers Union of Zimbabwe (UTWUZ); and the Zimbabwe Clothing Industry Workers' Union (ZCIWU). The first three are affiliated to the ITGLWF.

In 1982 there were about 45,000 workers in the industry, a third of them unionised. Since 1982, however, the industry has

weakened considerably, mainly due to a number of firms removing to Botswana and exporting into Zimbabwe, undercutting local firms. The resultant job losses and lowering morale have meant that all four unions have lost substantial numbers of members.

In view of this situation, and the government's policy of one union for each industry, attempts have been made to unite first the clothing unions and subsequently all four unions.

Discussions are taking place with the ZCTU, and although a merger does not appear to be imminent it is hoped that some or all of the unions may unite during the course of the proposed revised project. The new project description will be discussed with the ICFTU in January 1985.

#### Previous educational activities

To date five courses have been held for organisers and two for study-circle leaders. 120 union officials participated, and the programme was planned and executed with a high degree of involvement from the four unions. In June 1984 a two-day workshop was organised to evaluate the effectiveness of the project and make plans for a second phase. The following points were made:

- a) The organisers' courses had been successful in stimulating union recruitment and improving organising skills.
- b) Relationships between workers' committees and the unions had improved in a number of cases.
- c) The two study-circle courses had been less effective as there had been no follow-up, mainly because of financial constraints.
- d) The project had strengthened the unions at a time when they were under severe pressure.

- e) The need still remained to stimulate membership and raise the consciousness of trade unionists.

Objectives of the second phase

- to build and strengthen union organisation at branch and workplace level
- to train branch and workplace representatives to represent their members effectively
- to assist the organising of new members into the union
- to develop the consciousness of the membership about union aims
- to educate the membership about its role in economic development
- to help to build permanent education departments in the unions
- to build a team of instructors and study circle leaders throughout the unions' organisations
- to encourage the unions to have their own permanent, selfreliant programmes by the end of the project.

Educational methods

All education carried out under the project will use active learning methods. The main ideas behind this approach are that:

- the learning process starts from the experience of the participants and builds from there

- participants learn through co-operative group activities and discussions
- education is problem-centred and asks participants to plan improvements
- important union skills, such as chairing meetings and collective decision-making, are practised throughout.

Suitable course materials will be adapted from those available from the ZCTU Education Department.

### Courses

It is proposed to hold the following courses:

- a) Three one-week workshops for national officers to provide an opportunity to analyse the problems of the industry and to plan strategies for dealing with them.
- b) A two-week course for union educators from the five main regional centres, to cover active learning methods and the planning of regional education programme. This would be followed later by a one-week workshop to review progress and consider solutions to any difficulties that had arisen.
- c) Three two-week non-residential courses for study-circle leaders in each of the five regions, dealing both with the techniques of organising and leading study circles, and with trade union issues such as representing the members and dealing with management. These would train a total of some 225 leaders.

### Observations

1. There was some confusion at the ICFTU as to whether the LO grant for the original project had been spent, mainly due to the similarity between the FNV- and LO-funded projects. The

evaluation team finds it extremely regrettable that due to the over-funding of the project the TIGLWF did not make use of the LO grant and has kept the money unspent for two years.

2. The original project proposal, which was for one year, gave little indication of the aims and objectives of the programme. The revised proposal as it stands at the moment does provide a more comprehensive set of aims and objectives.

3. In view of the ICFTU and LO policies on South Africa, the team was concerned about the fact that the ITGLWF still maintains its links with South African trade unions mainly through affiliates of the Trade Union Congress of South Africa (TUCSA), which has supported the apartheid policy of the SA government. Only one of their South African affiliates is from the black/non-racial unions.

#### Recommendations

1. We recommend that the ICFTU and the LO discuss the revised project proposal. If they accept it, one condition should be that the programme is for all main unions in the textile and clothing industry and not only the three which are affiliated to the ITGLWF.

2. Due consideration should be given to the project in the light of ICFTU and LO policy on Southern Africa.

## 6.2 ZIMBABWE LABOUR COLLEGE

---

### Background

Strictly speaking, the project under review consists of the sum of US \$42,102, donated by LO-Norway through the ICFTU to the ZCTU for the purpose of co-financing - together with the FNV-Netherlands and other ICFTU affiliates - the purchase of the property 'Observatory Inn' outside Harare, to be turned into a Labour College owned and run by the ZCTU.

In the project document the total price was estimated at Z\$100,000, then (in 1983) equivalent to US \$103,853, but today (Dec. 1984) much less because of the rise in value of the US dollar. The present value is of interest as the property has not yet been bought, and the money is still in the possession of the ICFTU. In the meantime, the price of Observatory Inn has been increased to Z\$160,000. Other potential sites have been considered but at the time of our visit to Zimbabwe interest was again concentrated on Observatory Inn, which two members of the team visited.

As usual, our sources of information consist of the relevant project papers and interviews with knowledgeable people in Harare, Brussels and Oslo. During our mission, however, we became aware that towards the end of 1983, after the international funding had been committed, the ICFTU had commissioned a Canadian trade union representative to make a feasibility study on the Zimbabwe labour college question. Despite continuous efforts we were not given access to the report of this study until the first consolidated draft of our own report was ready. Because of its confidential nature we cannot refer to any of its findings but will limit ourselves to regretting that the report was not part of our original



briefing as this would have facilitated our own work enormously.

### Project description

While emphasising the need to diversify education regionally and through the individual unions, the ZCTU felt it was necessary to centralise a part of its programme. In the absence of a national centre, a number of venues were used - hotels and two non-union colleges - which proved expensive and not very practical. In 1982, therefore, the ZCTU made a request to the ICFTU for assistance with the construction of a trade union college so that it could develop its programme independently of these constraints.

### Aims and objectives

The college would have the following functions:

- a) organising general leadership courses of at least 3 months' duration;
- b) organising specialised courses for trade unions;
- c) organising orientation courses for trade union educators;
- d) providing facilities to ZCTU affiliated unions to run national programmes;
- e) providing conference facilities for unions;
- f) providing the administrative facilities for the ZCTU education programme;
- g) forming the nucleus of a documentation and research centre for the trade union movement - to this end a small library would be established.

It is planned that in the first year there should be one 3-month course; two courses of two weeks each for organisers, educators, and 'others' (total 6); one course of two weeks for negotiators and financial administrators (total 2). About 20 participants would attend each, making a total of about 180. It is, however, estimated that the college would have the capacity for about 400 trainees a year, so this would mean some 220 places being reserved for the educational activities of individual unions or 'friendly organisations' which are not integrated into the ZCTU programme.

### Target groups

As the ZCTU feels that the main concern of trade union education to date has been with rank and file members and shop-floor representatives, its stated aim is to use the college to concentrate its energies in two main areas:

- a) the specialised courses for organisers, administrators, negotiators, educators, etc. to give them the tools to better perform their particular duties, and
- b) the longer courses for trade union leaders, especially those in the middle ranks, to give them knowledge and understanding to help them develop into national leaders.

### Contents of the general course

This course would last at least 3 months, though possibly not all in one block, in order to give detailed attention to a range of trade union issues at all levels from local to international. These would include labour laws, industrial relations - especially machinery for resolving disputes, international labour standards, health and safety regulations; analysis of current trends in relation to wages, prices, productivity levels, workers' participation in decision making; study of the historical development of the trade union movement in Zimbabwe and other countries. An important objective of the

course would be to deal with the concepts of capitalism and socialism and how they relate to workers.

### Staff

The College would have a full-time staff of 14, including three tutors (one economist and two in trade union studies). The Director was originally planned to be the Secretary of Education at the ZCTU.

### Finances

The financing of the College needs to be divided into a number of categories - purchase of site, building or re-building, refurnishing and equipping, running costs.

The favoured site is the above-mentioned Observatory Inn in substantial grounds some 20 km from Harare. The purchasing price would be met through assistance from friendly trade union centres overseas. Not much re-building would be required in order to house and service 40 participants; an extension to the buildings in order to cater for another 100 trainees would be assisted by the Yugoslav Federation of Trade Unions with a gift of pre-fabricated building materials. The costs of furniture and equipment would be met by a special appeal to ZCTU members, while it was thought that running costs would be covered by an education levy on trade union members and by charging fees to affiliates and other organisations for the use of College facilities.

### Progress to date

Although the project proposal dates from 1982, the College has not yet come into being. A number of difficulties have arisen. Various sites have been considered in turn; the first choice approved by the ICFTU, and now under consideration again, turned out to cost Z\$60,000 more than the Z\$100,000 originally anticipated. The Dutch and Norwegian trade union centres have

promised the original Z\$100,000, and the Canadians are being approached for the balance. At the same time the ZCTU has also expressed an interest in a plot of land in Harare itself.

Confusion and uncertainty have been increased by the arrival of items of material aid, in particular the prefabricated buildings provided by the Yugoslavs, and a quantity of mattresses from Rumania and Bulgaria requested by the ZCTU before the project had even been established and without reference to the other donors. It is clear that there is a general lack of coordination between the government, the ZCTU, the ICFTU and the donor agencies.

### Observations

These confusions are symptomatic of the lack of preparation of the project, and the absence of a detailed report on feasibility and costings before the project was approved by several donors.

A number of worries have been expressed both by donor agencies and by local parties concerned in the project. One is whether the relatively newly-established and inexperienced ZCTU can in fact effectively manage an institution such as the College. In addition, the situation has been further complicated by the government's suspension of top ZCTU leaders and the possibility of other measures that may follow in the wake of this. To deal with this, at least partially, there is a suggestion to set up an independent body of trustees, including representatives from the ZCTU, the University, and perhaps other educational institutions such as Silveira House and Ranche House. The Ministry of Labour has agreed to the appointment of an adviser by the donor agencies, probably a Canadian if Canada decides to take part in the project, provided the Principal is a Zimbabwean.

Concern is also felt over possible future political developments: whether the government is likely to establish a

one-party state and if, in this case, it might subsequently take over the College. This is what happened to the ICFTU College in Uganda in the late 1960s.

At another level, anxiety has been expressed that the establishment of a national centre of this kind would have an adverse effect on local and regional education programmes, given the shortage of human and financial resources.

### Conclusions and recommendations

1. Our main conclusion is that this project should be called off as soon as possible: in any case LO-Norway should withdraw its pledge to co-finance it. The funds allocated could still be utilised for some useful educational purpose within the framework of the Zimbabwe trade union movement, when the trade union situation is back to normal and a new ZCTU leadership has been duly elected.

The main reasons for proposing a cancellation of the project are the following: first, it would be both unfair and irresponsible to put this huge responsibility on the shoulders of such a weak structure as the ZCTU. Second, it is doubtful whether a national trade union college of this character really meets the most urgent needs of the Zimbabwe trade union movement. The ZCTU itself, in the project documents, has emphasised the immediate need for regional and local activities, so we suggest that the project should start at the grass-root level, and from there move forwards and upwards. Third, the total project, at least the way it has been presented in the project document, has not been properly planned. The cost estimates seem unrealistic whereas the expected income and its sources are nothing but mirages. The following example is presented as an illustration of this: no salary cost was budgeted for the college Director because he 'will be the Secretary of Education of the ZCTU. His wages will therefore be paid from a different vote'. It

is, however, clearly impossible for one person to carry out two of the most demanding jobs in the Zimbabwe trade union movement.

2. If the ICFTU decides to go ahead with this project, with or without the Norwegian contribution, we would strongly recommend that the ownership and management of the College be organised in a way that would give the institution an independent status with respect to the business side of the ZCTU. The College must be a legal entity in its own right, and it must not be possible to use it as a pawn to set off deficits in the running of the ZCTU itself. The idea that officials would be interchangeable between the two institutions in their daily work, as suggested in the project document, must be ruled out.
  
3. With respect to the projected site itself, the team commends its location and beautiful surroundings but warns against the assumption that the present buildings can easily and cheaply be converted into a suitable labour college. This is not the case.

### 6.3 COURSES FOR WOMEN TRADE UNIONISTS - ZIMBABWE

---

#### Background

In the history of Zimbabwe's trade unions women are largely invisible. The active participation of women in the struggle for Independence, however, led them to seek recognition and integration into the country's economic and political life. The trade unions also saw the need to promote the active participation of women and several steps have been taken to reach women workers as a group with specific needs. The ZCTU has appointed a woman educator, and assistance had been obtained from several external sources for women's training courses. The African American Labor Center (AALC) has supported activities for women's trade union leadership development, and the LO agreed in 1983 to support two courses for women trade unionists. With very limited documentation available, information on the plans and progress of the women's training courses was largely obtained from interviews with ZCTU training officers and from women who had participated in the courses.

#### Implementation

Two week-long courses were held in 1984, one in Bulawayo and one in Mutare.

#### Selection and profile of participants

There were various methods of selection:

- some women were elected by fellow union members;

- some were selected by committee, usually based on length of membership;
- in some cases they were the only women in the branch;
- some worked in a union office.

The team met 11 of the women who attended the Bulawayo course. Their ages ranged from the early twenties to the early thirties, and the length of time they had been in a union varied from a few months to, in one case, 15 years - most had been members for between two and four years. Two had no children, the others had between one and six each. One held an office in the union; three had attended at least one course before.

We met 7 of the women who attended the Mutare course. Their age range was similar, though more were in their early twenties. Length of union membership varied between one and six years, and most had been members for one or two years. Two had no children, the others had between one and six each. One held an office in the union and three had attended courses before.

Participants in both courses came from a variety of different unions including the Transport & General Workers' Union, railway workers, plantation and agricultural workers, catering workers, and clothing industry workers' unions.

#### Pre-course preparation

Over half the participants had received 3-4 weeks' notice of the courses though three of them had one day's warning or less. A few had received a letter before attending but most had no idea about the purpose of the course or even its title. No-one received a timetable or any background literature.



All the participants were delighted when they discovered the subject matter of the seminar and that only women would be discussing the issues.

#### Course content and methodology

The Bulawayo course got off to a good start with Evy Buverud-Pedersen from the LO talking about women in the Norwegian trade unions. The participants were very interested in what women had achieved in Norway, especially in comparison with their own situation. They regretted that she could only spend a short time with them as they had many more questions to put to her. They also thought it a pity that all the other tutors and lecturers were men, apart from the woman who gave a talk on family planning.

#### Comments on the course and follow-up

The women felt that the courses had been beneficial simply by bringing them together to share their particular perceptions and problems as women trade unionists. They thought all the subjects covered in the week were useful and reasonably well-presented. They saw the most important session as that on women's rights, and also appreciated talks on methods for handling grievances, procedures at meetings, and communications. The two topics subsequently found to be of most use in the work-place were grievance handling and methods of recruitment.

"The seminar was an eye-opener on several items concerning women's role in trade unions. In order for us to fully participate our male colleagues should also be educated... We were made aware that women can play a great role in unions" (Bulawayo participant).

Four participants had meetings with other women at their workplace following the courses. Another had rung around to other women who had been on the Bulawayo course to find out what they were doing as a result of it.

#### Observations and recommendations

Although the ZCTU has accepted the principle of women's training courses, the weak position of women in the unions has led to delays in implementation and only a partial utilisation of the allocated funds. Limited staffing in the Education Department has meant that the women educator has had to share in the responsibility for the general union courses, leaving her little time to concentrate on the women's programme.

The team was informed that the ZCTU had requested the LO's permission to run another women's seminar using unspent funds. We can only support the continuation of women's courses, since it was our impression that they provided valuable experience for the participants and also the planners. At the same time, we felt that the ZCTU should give higher priority to these activities and make sure that courses are planned with the intention of providing a systematic education programme for women workers throughout the country. We hope that the proposed strengthening of the ZCTU Women's Department, which is staffed by highly competent women, will soon take place and that this will have a beneficial effect on the workers' education activities for women.

We have the following specific suggestions to make:

1. It is regrettable that several of those attending the courses had little advance warning and only a few had any idea what the courses were about. Pre-course documentation should in future be an integral part of every course.

2. The method of selection of participants was rather haphazard. We recommend increased dialogue with the unions represented as to the purpose of the course and possible follow-up.
3. We suggest that the contents of the course should be based more particularly upon what women trade unionists perceive as their own interests, problems and needs, rather than being a slightly modified version of the general trade union course. More women lecturers would be desirable.
4. We recommend that a concerted effort is made within the ZCTU to strengthen its capacity to run a well-planned programme for women. It would help greatly if one educator could concentrate on developing women's courses, with the assistance of the Women's Department and external educators.
5. Experience has been gained in the development of training materials and teaching aids by the four members of the Education Department, who have worked on study-circle materials with the assistance of the CTUC adviser. There seem, however, to be few materials which deal with the particular situation of a socialist society or with the particular position of women in trade unions. Nor are materials available for the women to take away and use. We recommend that effort is directed to the production of suitable materials in sufficient numbers for course participants to take away.
6. There is as yet very limited information on women's work and social conditions on which relevant teaching materials can best be based. It is recommended that documentation be collected on these issues, perhaps in liaison with concerned women's organisations and researchers. It would also be particularly helpful to look into the reasons for the low number of women in trade unions.

6.4 TRADE UNIONISTS' STUDY TOURS FROM ZIBABWE TO ICFTU,  
BRUSSELS AND SØRMARKA LABOUR COLLEGE, NORWAY

---

Since the evaluation team had no access to any project document on the study tours, the team relied on the organisers' impressions, the participants' evaluation and our close interaction with participants from the 1983 and 1984 study tours at the evaluation seminar, Harare, 3-5 September 1984.

Objectives

The broad objectives of the 17-day study tour are as follows:

- a) exposure of third world trade unionists to a global perspective on trade unions in the context of the world economy;
- b) exposure to the democratic tradition and style of functioning of Norwegian trade unions;
- c) the acquisition of knowledge and skills in relation to collective bargaining, grievance-handling and management of industrial disputes (1983), and education and information (1984).

While the objectives for the 1983 and 1984 tours were mostly the same, some differences stand out between the two with regard to the preparation of the participants. Opinions on the two tours as stated by the two lots of participants we met were very similar.

### Preparation

Prior to the 1984 tour a one-week briefing seminar was arranged for the participating delegates. No briefing was held in 1983. The 1984 participants collected valuable but limited information at this briefing seminar. The Norwegian educator responsible for the study tour did not share the view of the participants that the 1984 briefing seminar made much of a difference and felt that neither group was satisfactorily prepared. His suggestion was that a Norwegian should go to Zimbabwe, do a briefing on the Norwegian situation and provide participants with materials. As it stands at present the Norwegian educator meets the participants in Brussels.

### Selection of participants

Participants were nominated by individual unions after invitation by the ZCTU. This led to big differences in the levels of participants' knowledge. The ZCTU has been encouraged to make a more even selection, and there was some improvement in 1984, but selection still creates problems. In principle participants are all senior officers in their unions. In practice there is a wide gap in their trade union experience and motivation.

The 1983 and 1984 participants were interviewed separately, and the following observations were made:

### 1983 Study Tour

We wanted to discover from the participants (5 women and 4 men) their understanding of the objectives of the study tour before they left for Norway. They could recall only two objectives, which were knowledge about collective bargaining and methods of grievance handling.

However, when we asked them about their own objectives/priorities in learning while abroad, a large number of themes was mentioned:

- i) the reasons for collaborative relations between management and trade unions in Norway
- ii) the role of women in trade unions
- iii) methods of recruiting members into trade unions
- iv) trade union education
- v) coordination between the LO, affiliated unions and government
- vi) the ICFTU's policies re. South Africa, Namibia, multinationals, etc.
- vii) information about high technology fields such as oil exploration, telecommunications, etc.
- viii) learning about the quality of democracy in Norwegian culture

#### Form and content

We asked the participants what they felt they had gained as trade union leaders. The Brussels part of the tour consisted mainly of information-sharing sessions on the world economy, trade union rights, the role of International Trade Secretariats, etc. The major benefits were listed as the availability of numerous trade union documents, the gaining of awareness about trade union activities, and the influence of political forces on trade unions.

Positive feelings were expressed about the following items in the Norwegian part of the course: detailed history and knowledge of collective bargaining; the importance of trade union education and how it is financed; the management of social security schemes of trade unions; professionalism in trade union management; the democratic internal functioning of trade unions; inter-union relationships and communication; women's rights in Norway; dealing with drunkenness and other problems among some workers, etc.

The participants criticised the emphasis on lecturing and the lack of scope for discussions. They also felt that too many diverse themes were included during too short a period.

#### Follow-up

When asked what they had done to implement some of these ideas and practice back home, only four of the participants responded concretely:

- a) a study-circle had been initiated on contemporary themes of trade union relevance;
- b) specific efforts, with partial success, had been made to enrol women members;
- c) a more active role as educator had been taken, and use made of materials obtained in Norway and Brussels;
- d) efforts had been made to democratise the functioning of a Branch Executive Committee.

### Some observations

Before we offer our recommendations, we provide some observations:

- 1) The selection procedure is basically democratic but uneven in character. Three participants were ordinary union members with 3-4 years' service, while one had 16 years of trade union experience. As a result, some participants had difficulty in understanding some subjects while abroad.
- 2) All participants mentioned that they had submitted reports to their union executives (3 verbal and 6 written). One unified report was given to the ZCTU. No one brought a copy of his/her individual report to the Harare evaluation seminar.
- 3) 7 out of 9 participants had, since their return, acquired more responsibility in their own trade unions.

### 1984 Study Tour

This trip had 11 participants, 2 women and 9 men. 5 of the men were present at the September 1984 evaluation seminar in Harare, but neither of the women.

The team wanted to know from the participants whether the study tour had been discussed with their union and fellow workers, and what plans had been made for reporting back. No discussions seem to have taken place on what should be the benefit to unions of sending delegates abroad. Unions may turn to returning participants afterwards for information but this is incidental rather than planned. The form of reporting back to unions was not planned in advance; participants had given individual reports - oral only - to the ZCTU and their national unions, but group reports to the IO and the ICFTU.



Several plans were mentioned as being in the pipeline for utilising information and experiences from the study tour, but few of these had yet materialised. Activities that were mentioned include:

- a Harare-based seminar for the Zimbabwe Motor industry Workers Union, where experiences from Norway would be communicated;
- material from Norway and the ICFTU would be used at a United Food and Allied Workers Union regional seminar;
- the Post & Telecommunications Union had plans to work out an education programme where the materials would be used.

It is the general impression that participants appreciated the Brussels/Norway trips; however, a number of comments were made by the participants which indicated that the courses had severe limitations in form and content.

#### Form

Participants were most disappointed about the massive input of lectures, most often not even substantiated by a written manuscript which might have been consulted afterwards. The same criticism stated by the 1983 participants was extended to the 1984 tour regarding the piling-up of information in lecture form with no time for an exchange of viewpoints afterwards. This went for Brussels as well as for Norway. In some cases lectures had been completely inaccessible to the participants as when, for example, a lawyer had been lecturing on Norwegian labour laws in language understandable only by other law specialists. Participants had expected that more advanced teaching methodologies would be demonstrated, including role play, case studies and 'constructive learning' in general. This had not been the case and lecturers had not functioned as resource persons.

### Content

The lecture and classroom-based methodology made it difficult to absorb the heavy concentration of material on the operation of Norwegian grievance handling, collective bargaining, workers' participation, etc. The participants appreciated a factory visit and contact with a Norwegian sister union, and would have liked much more contact with Norwegian fellow workers.

The participants realised that time did not allow for all they could have wished and consequently recommended that the courses be much extended, to 3 or 4 months. The desired mixture of theoretical issues and practical activities such as factory visits could not otherwise be accomplished.

### International contacts

It was the general feeling among the participants that time should have been allowed for them to bring up their concerns and experiences. Although most of the participants knew each other in advance this would have been an opportunity for exchanging views between unions. Little time was set aside for an exchange of views between Norwegians and the visitors, especially on the subject of workers' education. The delegates felt they had experiences to offer to the Norwegians as well as vice-versa. With the limited time available and the course being held in a relatively isolated place, social activities outside the group were kept to a minimum.

### Benefits

It was stressed by the Norwegian educator that the importance of the Norwegian-based courses was that they gave participants inputs and inspirations, even if Norwegian trade union experiences could not be directly transferred. This viewpoint

was generally shared by the participants. For example, they had observed a number of differences between the Norwegian and Zimbabwean labour laws and practices:

- i) the retroactive nature of the Norwegian collective bargain results - enforcement only after Gazette announcement in Zimbabwe;
- ii) strike notice of one month in Norway - the impossibility of calling an official strike in Zimbabwe;
- iii) the accumulation of strike funds in Norway - none in Zimbabwe;
- iv) effective Health & Safety inspection in Norway - a law to the same effect in Zimbabwe, but not enforced;
- v) workers' participation and easy access to information in Norway - not in Zimbabwe;
- vi) a close relationship between the Workers' Education Department (AOF) and the national trade union centre in Norway - a weak Education Department in Zimbabwe;
- vii) an impressive collection of information on wages, prices, technology etc. in Norway - the need for a research desk at the ZCTU, also for its own studies of the IMF, MNCs etc., presently only undertaken by the Zimbabwe Institute of Development Studies (a government agency).

Discussions with the participants did not lead us to believe that their appreciation of these comparisons and differences were likely to lead to any real changes in the Zimbabwean situation.

Observations and recommendations

These follow the next section and take in both the study tours and the seminars for trade union organisers.

6.5 SEMINAR IN NORWAY FOR ORGANISERS IN TRADE UNIONS:  
SOUTHERN AFRICA

---

On the same lines as the seminars for Zimbabwean trade union leaders, the LO organises courses for Southern African trade union organisers. The team met with a Zimbabwean participant from 1983 and with two delegates in Botswana who were due to participate in the 2-week September 1984 seminar in Sørmarka.

Comments on the the Southern African organisers' seminar confirm those on the 1984 Zimbabwe/Brussels/Norway seminar. The participants found it remarkable that no efforts had been made to take advantage of having a mixed group of trade unionists with experience from different countries in Southern Africa. Instead the seminar had largely been a one-way communication from the lecturers to the visitors.

The two Botswana trade unionists, due to travel to Norway on the same day as the interview, were involved in organising workers' education programmes but had limited experience. It was surprising to learn that they had received no information about the programme in advance; the expectations they expressed were not likely to match what would be provided during the course in Norway. Both hoped to learn how Norwegians plan their workers' education programmes, develop course material and teaching aids, do cost calculations etc, since the development of proper courses and training material is what they stated they most needed.

Some observations on study tours/seminars

It is not our intention to apply narrow cost-benefit considerations to the tours. If this were the only relevant criterion study tours would never have been introduced in the first place. However, the costly study tour courses should be considered in relation to at least two points: a) the quality of the courses and the benefits to the participants and their unions, and b) the priorities of the national trade union movement in the participating Southern African countries.

With regard to (a), the comments by participants on the form as well as the content of the courses seriously question the value of these in their present form. In order to improve the quality of the courses a number of redefinitions are necessary. Some ideas are suggested below.

Concerning (b), the priorities of national trade union movements for workers' education programmes, the team noted the following:

- i) The study tours were not included in the ZCTU's priority course plans. However, since they were offered by the LO, they had been accepted as part of its programme.
- ii) Discussions with the ZCTU delegates, including the Workers' Education Officer, indicated that ZCTU officials were much more concerned with how courses at the intermediate and shop-floor levels could be strengthened in the regions. Some openly pointed to regional and local seminars as a priority alternative to the expensive study tours abroad.

## Recommendations

The following suggestions are made here:

1. The LO should be more alert to the priorities for workers' education programmes of the individual national Centres, in this case first of all the ZCTU, and give its assistance to priority courses. In the short run, until new priorities come up, this would diminish if not completely stop the study tour activities.
2. If for other reasons the LO decides to continue to offer study tours, it is suggested that this should become an infrequent exercise, maybe once in three years. The limited success of the study tours in terms of participants' active contribution after returning home does not justify an annual venture.
3. Even a once-in-3-year programme should be essentially directed to those who will be required to devote a considerable amount of their time and talents to organising activities in the trade unions. This might in the long run assist in the democratisation of trade union functioning which is an essential need in Zimbabwe (and in Botswana).
4. With regard to the Southern African trade union organisers' seminars, the importance of bringing organisers together from neighbouring countries in the area justifies a reconsideration of the appropriate meeting place. Instead of bringing organisers to Europe, more frequent meetings could be arranged within the region. It is believed that exposure to the democratic traditions of other trade unions in the region, and to the problems they face, is of more immediate relevance than the experience of European trade unions.

5. If the Brussels/Norway study tours are continued several changes should be made to improve the quality of the courses:

a) A clearer definition of objectives should be developed and communicated to participants well in advance to avoid false expectations and to help participants prepare for the courses.

b) Course plans, contents and teaching methodology should also be made known to participants in advance.

c) Although it is not for the evaluation team to decide on details of objectives, contents and teaching methodologies of the courses, it is felt that a less 'Eurocentric' and a more 'internationalist' approach would make courses more relevant and motivating for the participants. Tutors should take advantage of the experiences which participants possess and include them in the programme.

d) The LO should take it as a challenge to demonstrate more advanced and participatory teaching methods. Dry lecturing with massive piling up of information should be avoided, or kept to a minimum.

e) It should be appreciated that the democratic traditions of the Norwegian trade union movement may be more easily grasped by the participants through direct contacts with sister union workers than from the classroom alone. More room should be provided for visits to sister unions and work places in the courses.

#### Note

Further reference is made to these courses in the context of our general comments on the International Trade Union School.



## 7. BOTSWANA

---

Area: 600,000 sq.km.

Population: 0.9m, growing at a rate of 3.8% a year (1982)

Employment: work force is 400,000 with over 20% unemployment

GNP: US \$900 per capita (1982)

Economic growth: 6.8% p.a. (1960-82)

Debt. service as % of exports: 1.6 (1980)

Inflation: 11.5% p.a. (average 1970-1982)

Botswana is a member of the Southern African Customs Union and of the South African Development Co-ordination Committee (SADCC).

Botswana is a cattle-rearing country with, it is estimated, four head of cattle for every human being. This average, however, belies the uneven distribution of the national herd: 15% of rural households own 75%, and 45% have no cattle at all.

Agriculture is under-developed, the land unevenly distributed, and much of it uncultivated. Food grains need to be imported - only 1/3 of the national requirement is produced locally.

The chief foreign exchange earner is mining; minerals, mainly diamonds, accounted for 81.1% of export earnings in 1981. This makes a significant contribution to the favourable balance of trade and relatively high growth rate enjoyed by Botswana.

Diamond profits have tended to benefit the large- and middle-scale cattle grazers, leaving the poor behind. A Bank of Botswana survey of rural households in 1980 revealed 1% of the rural population enjoying incomes of \$10,000 or more per year, while for 50% of rural households the figure was less than \$1,000. It is estimated that a quarter of young children are suffering from malnutrition.

Botswana's most urgent problem, exacerbated by the uneven distribution of national assets and the relatively high population growth rate, is unemployment. Approximately 20,000

people are expected to enter the work force each year until the end of the decade, while between 1979 and 1982 5,000 jobs were created annually. At the same time South Africa's intake of migrant labour is being considerably reduced.

Botswana's economic dependence on South Africa is strongly felt, especially as it is a land-locked country. 80% of the country's imports are from South Africa. The mining industry is totally dependent on South Africa because of the control it exercises over diamond marketing. Remittances from Botswana's 40,000 migrant workers in South Africa represent a significant contribution to the national economy.

#### MIGRANT LABOUR SYSTEM

The migrant labour system under which workers from South Africa's neighbouring countries are hired as contract labour to mines and farms in South Africa is well known as one of the worst aspects of the apartheid system. This has been a feature of life in Southern Africa for over a century. There is no prospect of this system being abolished within the foreseeable future, though reductions in the numbers being taken on, and uncertainty about the future, place additional strains on South Africa's neighbours.

The ILO estimates that Lesotho supplies 300,000 man years annually, Botswana 46,000, Malawi 25,000, Mozambique 50,000 and Swaziland 13,000, totalling 334,000 man years. The contract period for each worker is between 6 and 12 months.

The black independent trade unions inside South Africa have in the short scope of their existence been well aware of these problems. They have until recently, however, been barred from entering some sectors like the mines where the bulk of migrant workers find employment. The unions in the supplier countries are, on the other hand, generally ill-equipped to deal with the problems of migrant workers in South Africa. They are nevertheless fully conscious of the crucial importance of the

migrant labour system in relation to the economy and industrial relations of their countries.

### THE POSITION OF WOMEN

The migrant economy has strongly influenced the situation of women in Botswana, many of whom have taken on the sole responsibility for tilling land and rearing children for large parts of the year. Many women are also migrants themselves. Thousands of Botswana women are known to be working in South Africa, often illegally, as domestic workers and in the agricultural sector.

It is nevertheless an interesting fact that the participation of Botswana women in major areas of decision-making, in cabinet posts and other senior positions in the Botswana government, is perhaps unequalled in Africa. Within the trade union movement women's influence also seems to be increasing, notably through the recent election of a woman as General Secretary of the BFTU although the real effect of this remains to be seen. Representatives of the BFTU Women's Committee, whom the team met in Gaborone, told us they were making a concentrated effort to involve Botswana women in the development process.

### THE TRADE UNIONS

#### Labour force

The available information on the labour force is confusing and contradictory. One estimate puts the total work force at 400,000 of whom about 90,000 are employed in the formal sector.

### National trade union centre

The Botswana Federation of Trade Unions (BFTU) is the only major trade union centre. It claims to have 10 trade union affiliates, with a total membership (in 1983) of 9,600 (FAFO). Only two of the BFTU affiliates have more than 1000 members, and one has less than 100. Estimates of membership of non-BFTU unions range from 1,100 to 7,550.

### Political affiliations

The BFTU has no political affiliation. Among the union leaders and activists the team met we found supporters of both the ruling party and the opposition parties.

### International affiliation

The BFTU is affiliated to the ICFTU; it is also affiliated to the Organisation of African Trade Union Unity (OATUU) and to the Southern African Trade Union Coordinating Council (SATUCC) which in fact was formed in Gaborone. In a recent meeting it declared itself to be an autonomous body. It is expected that SATUCC, like SADCC, will establish its secretariat in Gaborone.

### The present situation

The BFTU is a weak organisation, further weakened by the effects of government legislation which forbids elected trade union representatives to work as full-time trade union officials. Together with the tendency to promote newly elected trade union officers into positions where they would be ineligible for union office, this has led to a high turnover of the BFTU leadership. In recent years the organisation has changed General Secretary and other top leaders every year.

The BFTU does have a small full-time administrative staff, but these are all professionals and not themselves members of any union.

Financially, the BFTU is to a large extent dependent on foreign support, particularly with respect to its workers' education activities. The main sponsoring agencies are the ICFTU, including the LO, the Afro-American Labor Centre (AALO), Friedrich Ebert Stiftung (FES), the Commonwealth Trade Union Congress (CTUC) and the International Labour Office (ILO). All of these agencies cover Botswana through country or regional representatives stationed in Botswana or in a neighbouring country.

#### Indications for the future

Discussion is taking place on the restructuring of the trade union movement, and there are reports that all trade unions in Botswana will have affiliated to the BFTU by the end of 1985. This would be an important achievement. It will also be necessary for the unions to strengthen their membership base.

But the BFTU can only become an authentic trade union centre with real strength if the restrictions put on it through legislation are lifted. To achieve this the BFTU will need assistance from international trade union organisations such as, for example, the ICFTU and the OATUU. ILO pressure may also be helpful despite the fact that Botswana has not ratified any ILO convention. The government may still be difficult to move, partly due to its fear of adverse South African reaction, and partly due to purely internal reasons.

## 7.1 MIGRANT LABOUR TRAINING - BOTSWANA

---

### Project background

The LO has been concerned for some time with the situation of migrant labour, and took part in an ICFTU delegation to Southern Africa in 1977 in order to gain further information and understanding. In February 1980 the ICFTU organised a seminar in Botswana to review the conditions of employment of migrant workers in South Africa.

A second seminar was held in Lesotho in October 1981 and following this the ICFTU initiated a pilot project in Lesotho with the aim of equipping the would-be migrants with the very basic principles of unionism together with information on health and safety and on such rights as they might have when in South Africa. The Botswana Federation of Trade Unions, which is an affiliate of the ICFTU, expressed the wish for a programme similar to the one in Lesotho to cover Botswana. The situation of Botswana is in many respects comparable to that of Lesotho.

Unions are now finally permitted to organise in the South African mines; this and other developments inside South Africa since 1982 have accentuated the need for a basic training of the migrant and would-be-migrant workers. Meanwhile, attempts to create employment opportunities in the supplying countries are being assisted by a new ILO research project which has established a steering committee in Gaborone.

## Objectives

The training programme aims to prepare migrant workers before they go or return to South Africa:

- i) by helping them to understand their contracts of employment;
- ii) by acquainting them with their legal rights;
- iii) by informing them about, and motivating them to join, trade unions.

The project plans to provide a condensed basic training in these fields:

- basic principles of trade unionism
- health and safety problems, especially in mining
- conditions for migrant workers in South Africa
- rights of migrant workers under contract and labour law
- trade unions in South Africa.

An additional aim is to create a better understanding inside Botswana of the role the unions have to play in relation to the migrant labour complex.

The main target groups are the newly recruited or returning migrant workers themselves, most of them miners. They are often ignorant of the conditions and hazards they may face when they arrive in South Africa, and few know of the existence of the newly-established black trade unions. The second target group is the authorities who negotiate general terms for migrants with South African employers, and who need to accept the principle that union representatives should be part of these negotiations.

Another target group was to have been the mine recruiting officers but they had to be omitted following the restructuring of the project due to TEBA's non-cooperation (see below).



### Project implementation

Launching the project in Botswana presented difficulties. The government was - and still is - reluctant to give its support through fear that it might lead the South African authorities to direct sanctions against Botswana, for example by reducing the number of labourers allowed into the country. South Africa was already cutting numbers of migrants and closing some of its recruitment centres in the Northern part of the country. The Labour Commissioner advised the project to be postponed, but out of respect for the independence of the unions did not forbid it to start.

In the early planning stages, it had been assumed that the main focus of the project's activities would be those migrants who were being recruited to the mining industry through the Employment Bureau of Africa Ltd (TEBA). This was how participants were first reached for the Lesotho training programme. The project was geared to proceeding on the basis of TEBA providing lists of recruited workers, and the unexpected non-cooperation of TEBA in Botswana was a serious set-back to the project. It was necessary to redefine general approaches, target groups, course organisation, and above all methods of finding and selecting course participants. It was suggested that with the assistance of local leaders and opinion-makers, migrant workers could be contacted in their villages in the main recruitment areas.

The project started on the weakest possible basis, without support from the Government or co-operation from TEBA, and with the BFTU internally weak, no permanent staff to get the project off the ground, and a forthcoming general election. Although the project was formally launched in September 1983, activities did not start until March 1984 when the first course was held.

### Personnel

It was originally planned to appoint a project director, from Botswana if possible, and three local educators/organisers. It was also proposed to send out a Norwegian workers' education expert to be attached to the project for 6 months; this was dropped partly because of the short duration of the posting, and partly because a suitable candidate could not be found. As the project stands at the present, there are two tutor-organisers, one of whom has the responsibility for project coordination. The ICFTU's regional representative acts as adviser on regular visits to the project.

### Selection and profile of participants

The selection of participants has been attempted with the assistance of traditional leaders who summon meetings for the project organisers to address, and has now also reverted to contacts with applicants outside TEBA recruitment offices.

Of the 65 participants on the 3 courses held at Ramotswa between March and August 1984, 45 had been in the mining industry, 18 in domestic service, one in the textile and one in the electronic industries. 18 participants were women. Of the 65 participants on the 3 courses held at Molepolole during the same period, 48 had been in mining and 17 were recruited or were on the verge of being recruited for mining. Of the 23 participants on the one course held at Kanye, 19 had been in mining and 4 were returning to the mines.

The second of the original target groups - the officials who negotiate terms for the migrants - have not had any courses directed at them.

### Form and content

The original plans were for introduction courses for migrant workers, weekend courses for migrant workers, weekend courses for recruiting officers, and seminars for union officials. As it turned out to be extremely difficult to identify new recruits the organisers decided that separate introduction courses were unnecessary. The idea of courses at weekends was very unpopular with potential participants because of the many family, cultural and sporting activities taking place then. In the end, five-day courses, to last the working week, were decided to be the most suitable format. Seven of these had been held by August 1984 since the project's activities started in March 1984.

### Subjects

There were essentially 7 subjects dealt with on each course, starting with a discussion on the problems of migrant workers while in South Africa and also while temporarily at home. This was usually followed by a lecture on basic trade unionism and its principles. It should be realised that some of the participants do not know what a trade union is before they start the course. As part of this, the participants were also lectured on the history and development of trade unions in Botswana, and on the trade union situation in South Africa, with particular emphasis on the mining trade unions. A great deal of time was devoted to health and safety issues at the place of work, and the problems facing women workers. The courses often concluded with a discussion on the rights of workers, under their contracts and also under the law; and how trade unions could help them to improve their conditions of employment. Emphasis was placed on the importance of workers' unity and solidarity while tribal differences were belittled and discouraged as far as possible.

### Methods and materials

The teaching methods combined lectures, group discussions, and the use of audio-visual aids. The emphasis was on discussion to explore the problems faced by migrant workers and possible solutions. Most teaching was conducted by the project organisers, with input from an official of the Occupational Health & Safety Unit for work on health and safety issues.

There is a general shortage of suitable teaching materials, especially for distribution to the students, and bearing in mind that some are illiterate. Materials from various institutions are available in the preparation of courses, including documents from unions in Botswana and South Africa, the ICFTU, the Occupational Health & Safety Unit at the Ministry of Health, and the Lesotho Migrant Labour Project. For the topic on conditions of employment in South Africa, the project uses the contracts of employment offered by TEBA to migrant workers, supplemented by the workers' own experiences. The development of relevant teaching materials is a major problem for the project.

### Recommendation on materials

Simple and practical training handouts with illustrations should be prepared, and an additional budget allocation be granted for the purpose. It is a good idea to work out materials with returning migrants themselves.

Consideration should also be given to extending the use of audio-visual aids: the project could utilise the experience of the Occupational Health Unit in this field. We support the idea being discussed by the educators of making a film showing miners in other countries attempting to improve conditions of work and participating generally in union activities.

### Duration and evaluation

The project is initially intended to be of two years' duration. After that time there will be an overall evaluation of ICFTU activities for migrant workers in the region, including the Botswana and Lesotho training programmes. The project was started with considerable delay, and consideration of alterations to the project needs to be started as soon as possible. The project has kept detailed documentation of activities, including progress reports.

### Budget

The LO is contributing US \$168,888 through the executive agency, the ICFTU. The 1983 budget was written before the project had to be re-organised, and it should be noted that a number of items of expenditure have not occurred as anticipated.

The ICFTU has been concerned about the lack of a proper accounting system for the project and has recently sent someone from Brussels to assist in the establishment of a satisfactory system.

### Observations from course at Molepolole, 11-15 September 1984

The team was invited to be present at the basic trade union course in Molepolole on Wednesday, 12 September. Molepolole is the third largest village in the area, situated 35km north of Gaborone in dry, bushy land. TEBA has a recruitment office for mine workers here.

We were met by a crowd singing a local Tswana workers' song, directed by the project organiser, in an atmosphere of togetherness and brotherhood. From the beginning we sensed a good rapport between the instructor and the group.

We joined the participants for a meal. A nutritious daily meal and a cash amount of 5 Pula, paid after the course is over, have been introduced to help keep the participants motivated.

Interviews with two groups of participants, conducted with the co-operation of the project staff, left us with surprising information:

Of the 19 we interviewed, 13 had worked in mines in South Africa but none since 1982. All had been unemployed for between 2 and 10 years, apart from very irregular casual jobs for a few of them. Six were young school leavers who had never worked and were supported by their parents. Some had access to a small plot which was their primary source of survival. Not one of the 19 interviewed was a prospective or temporarily returned migrant worker.

The participants had been recruited for the course two days previously outside the TEBA office. They were applicants for jobs in the mines but their chances of being recruited were meagre after the long period all had been out of work.

We can only conclude that the group we met - however need of support and motivation - did not belong to the intended target group for these courses. These were supposed to be migrant mine workers on leave in Botswana, who by participating in the course would be motivated to join the trade union in South Africa and to stand up for their own and their fellow workers' rights.

We were later informed that of the remaining 30-35 participants, several were in fact recruited mineworkers, and copies of their contracts were presented to us. But the low proportion represented on this course certainly confirms the difficulty of reaching the intended target group.

### Conclusions and recommendations

The Botswana Migrant Workers Training Project deserves to be given a second chance to prove its worth because of its potential significance in the general struggle against apartheid and South African domination over neighbouring states including Botswana.

Our condition for recommending this is that steps are taken to improve the quality of the project implementation, which is not up to standard. We have suggested below a few measures that we believe may help the project. It must be borne in mind, however, that neither proposing solutions nor implementing the proposals is an easy task as this project is beset with difficulties. Some of these are of an external nature and mostly beyond the control of the project, whereas others are internal and could perhaps be overcome through a strengthening of the project. But a lot of diplomatic skill is needed!

The most important of the obstacles is no doubt the lack of TEBA co-operation and the low degree of government support. This has complicated and partly blocked the recruitment of course participants from among the primary target group (active migrant workers) and has excluded activities for the secondary target groups (government officials responsible for negotiating the migrant workers' terms of employment in South Africa and TEBA recruiting officers). It should be noted that the Lesotho Migrant Labour Project secured both government and TEBA support from the outset.

The low degree of government involvement may have several reasons. One important factor is obviously the possibility that the project might destabilise the country's already precarious relations with South Africa. Another could be the fact that this is a trade union-run project, largely controlled from abroad, and with no role given to the Labour Department in supervising its policies or monitoring its activities. It might also reflect a more general resentment of the trade union movement. It is possible that the Department of Labour is reluctant towards the project simply because it does not really

understand it, due to inadequate briefing and contact work by the project management.

Whatever the reasons, we would recommend that the project seeks active co-operation with the government, and if possible, through this with TEBA. We would suggest that as soon as decision has been taken on how to strengthen the project, the ICFTU and LO should get in touch with Labour Department and eventually TEBA representatives, together with the BFTU, to discuss the project openly and thoroughly with the purpose of improving the project. We also strongly recommend that the NORAD Resident Representative in Gaborone be invited to assist in organising this meeting and also to participate in it.

One of our observations in Botswana was that the local NORAD representative had not been involved at any stage of this project, or even given information about it. It is hard to understand how the people responsible for the project could have failed to use this excellent facility for relations with government and other non-trade union agencies.

When we met the Labour Commissioner he suggested that this project should be merged with the ILO regional project, 'Assistance to migrant workers in Southern Africa (Botswana and Mozambique)', because he felt the two projects were identical. As we see it, however, they are far from being identical. The ILO project is not a workers' education project but a pure research project, carried out in co-operation with the Labour Department and the University of Botswana, and is mainly aimed at providing up-to-date information on various aspects of the conditions of work of migrant workers in the South African mines. The project had not started when we visited Botswana, but we understand that it got under way in November 1984 and is supposed to run for 21 months. What brings the two projects close to each other is their common, long-term objective of improving the conditions of work and life of migrant workers. In our opinion a merger of the two projects is not a practical solution, but we are sure that both projects would benefit from close co-operation, based on the exchange of information and perhaps also of services.



The ILO/DANIDA/ICFTU migrant labour project in Lesotho has already been mentioned as one that is doing well, and one of the reasons for this is the project's good relations with the government and TEBA. Another important factor in Lesotho is the rich supply of potential course participants. Whereas the number of migrant mine workers from Botswana is less than 20,000, perhaps as many as 150,000 Basotho are working in South African mines. This has allowed the project to run courses in at least two towns simultaneously for almost every working week of the year, and to organise trade union training for thousands of migrant workers.

Evidently, no one would expect the Botswana project to reach this high level of training activities, but one might have expected a greater number of courses than were actually held, and that they should have been run for those the project is aimed at. This has not always been the case. It seems that the present methods of recruiting participants, even with good co-operation from the village chiefs, are not good enough. In the seminar that we attended there was a considerable number of non-active migrants, perhaps even non-migrants. A new strategy for recruiting course participants must therefore be drawn up. An additional point to consider might be the inclusion of spouses in some parts of the courses, as the migrant labour system very much affects the lives of the families left behind.

The third important factor contributing to the success of the Lesotho project has been the presence, from the outset, of a project manager of high quality. In Botswana there is no such person. The only technical guidance of any significance received by the project is from the ICFTU regional representative, stationed in Maseru, Lesotho, during his fairly regular visits to Gaborone. But although he is doing an excellent job within his limited time capacity, it is not enough to meet the needs of the project. What is needed is a devoted and capable project manager to look after all aspects of project implementation.

The most urgent responsibilities would of course be to improve working relations with the government and eventually TEBA, and draw up an adequate recruitment and selection strategy. Another priority should be the on-the-job training for the project staff. In the long run this might not only benefit the project and the migrant workers but also the Botswana trade union movement, to which the national project staff belong and where such knowledge and skills as they would acquire are practically non-existent. The project manager would also have to play an important role in developing training programmes for the migrant workers, and in doing this, see to it that courses are offered at progressive proficiency levels. This would enable interested first-time participants to come back for more, and perhaps, specialised training. The development of training materials and audio-visual aids is also an area where the assistance of a project manager is badly needed.

Admittedly, it would not be easy to find a person who could carry out the duties described above. This person should have a sound trade union background and extensive national and international experience in workers' education. He/she should have the ability to identify and cater for trade union training needs and experience in developing and applying relevant teaching methods and materials. An absolutely essential qualification is a full understanding of the Southern African situation including the migrant labour problem. In addition, the manager should have the ability to co-ordinate activities with trade unions and workers' education bodies and other agencies as appropriate.

We are fully aware that the appointment of a project manager with the above qualifications would represent a considerable increase in the donor's contribution, but we are equally convinced that taking this step to strengthen the project would be a worthwhile investment.

An observation on educators: We regretted the fact that the BFTU tends to use the two project educators for a variety of educational tasks rather than helping them concentrate their

efforts on the migrant workers' programme. This is in part a reflection on the shortage of educators and we recommend that the BFTU makes use of the migrant workers' courses to train more educators, especially among younger trade unionists and the migrant workers themselves.

As a final remark, we should like to mention that we believe it would be very useful for the project to maintain regular contact with the trade unions inside South Africa. This would facilitate the integration of the migrant mine workers at their places of work as well as in those unions and the feed-back from the South African unions would no doubt help the training programmes. And in the long run the project would hopefully assist the South African unions in playing its crucial role in the emancipation of the black workers in South Africa.



## 8. THE INTERNATIONAL TRADE UNION SCHOOL, SØRMARKA

---

In 1983 discussions took place between the LO and the workers' education organisation (AOF) with the aim of setting up an international school, which would cover all information and training activity of a trade union or political nature directed towards foreign participants (except from Nordic countries) carried out by the AOF in co-operation with the LO. The main target groups are participants from trade union organisations in developing countries. The school is based at the LO-AOF labour college at Sørmarka which was established in 1939. The school's activities take place partly in Norway, partly in other countries (for example, at the ICFTU in Brussels). The budget is approximately NOK 2m a year for 1984 and 1985 and is part of the LO/NORAD agreement.

The team's knowledge of the policy preparations for setting up the school are documents from discussions and agreements between the LO and the AOF in September and October 1983. Most of the specific guidelines are of an administrative nature and define the responsibilities for planning, budgeting, monitoring, cost control and so on. Some guidelines deal with objectives, methods, staffing, but only brief mention is made of some of the very difficult problems involved. The discussion papers, after touching on some of the key issues, state that the school must aim at a high standard, which can only be achieved through experimentation. 1984 is seen as a trial period.

Main conditions for the school are:

- that contact be established between school participants and Norwegian union representatives;
- that the school is able to furnish participants with basic information about Norway and its unions here before they arrive;
- that the issues to be covered are of a practical and concrete nature, particularly as they relate to the responsibilities of shop stewards at local level;
- that the school's activities in Norway should be designed in relation to, and be part of, integrated training in the countries of the participants. In the trial period at least one project should include local preparatory work before and follow-up work after the course in Norway;
- that facilities at Sørmarka should be better geared to the needs of overseas students.

The discussion papers mention a number of difficulties in organising this sort of activity, including:

- the variations in the development of third world unions and their different political and cultural contexts;
- the variations in educational level, organisational experience, and union position of participants;
- the problems of control in the selection of participants.

The recruitment of participants is supposed to take some key criteria into account:

- participants should return to specified union tasks;
- they should as far as possible have comparable union experience;
- they should come from study groups motivating them for the programme of the school as a whole;
- a number of international organisations such as the ICFTU or the ILO and bilateral LO projects are mentioned as possible ways of recruiting suitable participants.

The staffing of the school is not discussed in any detail, but a well-qualified leader is said to be critical and an adequate salary level is specified. A half-time administrative secretary is assigned to the school. Additional staff will be hired for specific tasks one each course (mostly as guest lecturers).

#### Observations

The team appreciates that the policy documents stress the difficult educational, organisational and political problems involved, but very limited material is presented by the school as part of the project plans. We note that 1984 is seen as an experimental period, but more specific objectives by which to judge the experiment and more discussion of methods would have been desirable. The team will mention only a few main points to be considered as our information is too limited to present a full evaluation of the school (some observations and recommendations are made in chapter 6.4 (a) and (b)). We suggest that the school and the LO set up a small evaluation team including at least one experienced professional from outside to evaluate the school's total programme for 1984. (Perhaps the advisory group mentioned in the original plans was proposed

partly for this purpose. We understand that it has not yet been appointed.)

A visit to Sørmarka during the evaluation session at the end of the course in September 1984 confirmed the information gathered by the evaluation team in Zimbabwe:

- All the participants appreciated the stay in Norway and the efforts of the staff. But opinions were split regarding the key issue of going to Norway versus spending the money on local activities in Africa.
- The selection of participants is basically rational and democratic, but preparation before travelling to Norway is often insufficient.
- The content of the course at Sørmarka is judged to be inspiring and useful as long-term orientation, but for most of the participants it is not easy to translate what is learned to the situation back home in Africa.
- The form of teaching could be better adapted to participants' background, not only for ease of learning but also to give them more chance to contribute to the sharing of information. Lectures are of very limited value when they cannot be followed by sufficient discussion, which was often the case. The form of programme offered by the ICFTU in Brussels (Sept. 84) was not judged favourably.
- The direct contact with Norwegian trade unionists, particularly at shop floor level, was judged to be of the highest value, but there was little time for this during the brief visit to Norway.

From the documentation we have seen and from the limited contacts with former and prospective course participants in



Africa, Malaysia and at Sørmarka we would raise two main questions:

- (1) What preliminary conclusions can be drawn regarding the value of short tours to Norway as compared to educational projects in the developing countries?

While one course in 1983 seems to have produced quite positive results, opinions are divided regarding two later courses. Both staff and participants raised the fundamental question of whether more could have been achieved by spending the money in the developing countries, rather than taking the participants to Norway.

Advantages of locally-based courses:

- The objectives could be more specific and more directly related to the problems of trade unionists of the country, and different regions and sectors within the country.
- Recruitment could be more systematic both in terms of the participants' background and their ability to leave their local commitments for project participation. Their return to the local situation to utilise what they had learnt would be easier and more related to follow-up action.
- Participation by local trade unionists in the planning, monitoring and follow-up of courses would be easier, in conjunction with highly qualified staff who should be available before, during and to some extent after the main educational events.
- The organisation of the courses would be directly linked to the central issues of how to organise a union and act as a chosen representative, how to mobilise people and solve problems, how to bargain and handle grievances, how to deal with employers, other unions, local and central authorities.

- A local or regional project is less likely to restrict the participation of women and minority groups.
- Training material and methods developed to fit local needs could be left behind for further use.
- The practical problems related to long-distance travel and a stay abroad would be eliminated.

Advantages of courses in Norway:

- A visit to another country with a fairly long tradition of democratic unionism give a useful perspective and provides a background against which to choose one's own way of building and running a union.
- A study tour in Europe makes it possible to learn more about the work of the international trade union movement and reinforce the cause of international solidarity.
- Opportunities are offered to meet Norwegian trade unionists and other people and make friendships which could be stimulating and supportive to both sides.
- The participants would be away from daily pressures and able to concentrate on their learning and development. They would also be away from political censorship and infiltration, which is a major problem in many countries.

The study tour and the local project approach do not of course exclude each other - they can be combined. In fact, as indicated above, the local approach or at least some part of it ought to be included in any programme of study tours. The problem is that if the visits to Sørmarka become part of a large training operation, including many other types of courses, the international trade union school may tend to become standardised, even routinised, in terms of both form and

content. This would be in contrast to the stated aims of responding to local needs in developing countries.

- (2) What are the school's and the LO's intentions in terms of building the competence needed?

While quite a number of administrative conditions have been formulated to guide the development of the school, very little is said about how to recruit and develop a competent staff. While solid experience in previous union education activities is valuable, it is far from sufficient for the requirements of the new school. A broader competence and experience is needed than what can be expected from a single full-time leader and one part-time administrative secretary.

It is taken for granted in the project plans that much of the training should be run by visiting teachers, specialists or advisers, including union leaders. To some extent this approach is useful, but lack of integration can easily be the result, as indicated by comments from participants about "hit-and run lecturing". The permanent staff should be sufficient to cover more of the lecture-discussion part than has been possible so far.

Different and complementary staff roles need to be created. This would cost more, but it is probably unavoidable if the quality of the programme is to be high, as stated in the policy papers.

A key role is that of the leader. His or her competence would not be primarily that of an administrator. The primary task would be to explore, organise and experiment with relevant forms of learning. Field experience from one or more different cultures would be essential, preferably as a result of educational or similar work in developing countries. Competence in negotiating and collaborating with international agencies and union organisations would also be necessary.

Another role would be that of a local or regional coordinator. That role could probably best be maintained through part-time assistance from an international organisation established in the region (the ILO, ICFTU etc.).

The most critical role besides that of leader would be a grass-roots educator-organiser who would live and work with the potential and returning participants. Ideally it should be a person from the region, possibly alternating with a Norwegian with considerable local experience.

If AOF-LO recruited and developed such a staff for the school, this group could also take on part-time tasks in the education of Norwegian trade union representatives and members. This would be more in line with Norwegian development policy, namely that the development process should aim at a two-way form of communication, learning and development. The present staffing arrangement seems to imply that Norwegian union leaders and educators can help trade unionists from developing countries simply by slightly modifying what they do for Norwegian workers' education.

### Recommendations

We only make three general recommendations:

1. The idea of developing an international wing or programme of the AOF/LO educational system should be pursued through practical experimentation. The present projects need to be modified according to experience already gained. Such an international programme could be of value not only to trade unions and development in the poor countries, but could also influence the large membership of unions here. The support of an advisory group is urgently needed, and we suggest that Norwegian trade unions could be more involved in the school.

2. A preliminary evaluation should be made early in 1985, according to the points and criteria mentioned above, to guide the monitoring of the projects planned for 1985.
3. A renewed discussion ought to take place as soon as possible regarding the size and qualifications of the staff needed to meet the ambitious objectives indicated in the original plans for the school.

We assume that if the proposed evaluation of the 1984 projects and the staffing issues takes place, this will deal with a number of fundamental issues we have only been able to touch upon in this chapter.



## 9. CONCLUSIONS AND RECOMMENDATIONS

---

### 9.1 INTRODUCTION

In this chapter we shall bring together a number of policy issues which we have found to be important in most of the projects evaluated. In all the project plans one can see that it is taken for granted that education and training contribute to strong trade unions. And it is taken for granted that strong trade unions contribute to development.

The evaluation team agrees that these are good working hypotheses. The team sees a strong and independent trade union movement, with a wide membership base and internal democracy, as an essential element in the development process at whatever level; local, national or regional. Trade unions based as they are on the democratic representation of organised labour, can make a special contribution to the growth of self-reliance. And in countries with repressive regimes unions may be able to play a special role in the struggle for freedom. We believe, however, that these hypotheses will only work under certain conditions and it has been one of our main tasks to identify those conditions which are positive and helpful, and also the negative trends which need to be corrected.

On the basis of evidence represented in previous chapters the general conclusion of the evaluation team is that the LO is in a good position to help realise Norwegian development policy. Our recommendation is therefore that the framework agreement between NORAD and the LO should be renewed. In the following sections we will discuss some major issues to be taken into account when a contract renewal is negotiated.

## 9.2 CADRE-BUILDING, ORGANISING AND SELF-RELIANCE

In most of the LO-sponsored projects the objectives are, at least implicitly, to enhance self-reliance. Nevertheless we found in several cases that educational programmes are seen as ends in themselves. Trade union education in the third world cannot be isolated from organisation-building: education and organising are two sides of the same coin. One can go so far as to say that when people have learned how to organise and learn, a basic condition for self-reliance has been created. It is important that this process is under-pinned by the open and democratic functioning of the unions themselves. Effective learning depends on the freedom to explore and experiment and even to challenge principles of organisation and leadership.

If the training does not help with organising and cadre-building, any improvement in knowledge or skills will fade quickly. The women's project in Malaysia needs strengthening to avoid this pitfall but has shown potential in the right direction. The same type of project in Indonesia does not seem to have much chance in this respect.

The broader educational programme in Indonesia, with a Norwegian director living in Jakarta, may contribute to cadre building among the participants. The problem is that the trade union organisations and the emerging cadres may serve the status quo rather than the union members. It is important to watch the reaction of the central trade union council when changes are made in the form and content of the training programme. If relevant adaptation is not tolerated then LO support should be withdrawn.

The Viking exchange project in Malaysia could fit into an integrated programme of information, education and cadre-building. This could be attempted at enterprise level with hopefully positive consequences at a national and international level. An international trade union school in



Norway might play an important role in such exchanges, but could not do so by running more or less standardised courses.

In a case like Jamaica, with comparatively strong trade unions, cadre-building and organising as part of education differ markedly from these processes in countries with weak unions and repressive governments. In Jamaica the centre sponsored by the LO functions as an important inter-organisational link. This project is also an illustration of the time it takes to make progress and the experimental nature of organisation-building through education, research and information. To choose the right target groups initially is critical, but it is equally important to integrate the education of special groups in policy-making and long-term institution-building. To succeed in this sense the Jamaican centre needs continued support through the LO programme. It also needs the greater involvement of the founding unions and to maintain the agreed level of governmental support.

The proposal for a labour college in Zimbabwe is an example of a project where the objectives, target groups, and form of the courses are imprecise and the justification for it inadequate. Such a centre has no meaning if it is not part of an organisation-building process which needs to be of a long-term nature based on local culture and a national strategy. The Zimbabwe college shows few signs of a realistic approach towards this end.

In Southern Africa, the LO-sponsored projects have started under such unfavourable conditions that results in terms of cadre-building cannot be expected in the near future. The best one can hope for is that a network of learning events will emerge. At the moment the projects do at least create some kind of platform where workers have a chance to meet, and this could be the only way that the seeds for organising can start growing. Recommendations in this direction are given in the relevant chapter.

### 9.3 TARGET GROUPS AND THE FORM AND CONTENT OF EDUCATION PROGRAMMES

---

Projects in the five different countries illustrate how target groups need to be chosen according to the historical, social and political background. It is not enough to rely on the accepted principle that education promotes development. We also found that the form and content of training needed to be adapted to the specific local conditions. In general and vocational education it is quite common for educational models to be exported to developing countries, with adverse consequences for development. Academic elites are created and over-specialisation may occur. Both phenomena are well-known barriers to development. In Malaysia a women's education project is highly relevant because of the weak position of women in the trade unions compared to their role in the labour market and in society at large. At the same time, it is evident that the project is not part of an integrated educational strategy, neither is it part of trade union policy to the extent of being given sufficient autonomy and resources. Under these conditions the content and form of education are particularly important. Inputs from the MTUC research project could be very useful but there is little co-operation at present. We found that the changes which were being worked out in the women's project perhaps provided a more significant form of learning than the direct acquisition of union skills and knowledge. To achieve this form of learning and to maintain it over time depends on the degree of policy support given by the trade unions. If such support is weak, as it is at present, the drop-out rate among participants will remain too high. Frustration rather than learning and development will be the main result. However, the Malaysian project has shown enough development potential to deserve further support.

In Indonesia a women's educational project is just as relevant as in Malaysia, but in spite of a promising opening phase the project has been side-tracked and no longer serves its purpose. It could in fact corrupt the educational idea and turn the

project into little more than a ladies' club. The project illustrates how the efforts of women to develop a relevant form and content to their educational activities can become a source of conflict. It is possible that the trade union leadership and the political establishment felt threatened. The changes that followed are of such a nature that it is not possible for us to recommend continued aid, but this does not mean that we underestimate the educational needs of women trade unionists. It now seems more useful to give the general educational project in Indonesia a chance to prove that with a broader target group it can also cover some of the women's needs for training. But this is again dependent on the form and content of training and the degree of freedom granted to trade unions by a government whose record is not good in this respect.

In Jamaica, the target groups have varied according to the capacity of the new training and research centre and the needs of the four founding unions. At the moment 'hard core' trade union skills training is combined with work-place and other specific types of training. These educational activities and other development functions of the trade unions are strongly supported by the centre's information service. The research wing of the centre has a potentially vital role to play in this context, but it needs more resources, more positive advice on how to proceed, and above all more support from the participating unions. One of the strengths of the Centre has been the continuous adaptation of the form and content of training to the target groups chosen. This has placed a heavy work-load on the staff, but it has been vital in motivating participants and their unions to use the services of the centre.

Experimentation of this sort is not without risks, as we observed in the cases of both Malaysia and Jamaica. Sponsors and local policy-makers must tolerate a certain amount of trial and error as long as the experiences are used constructively. The projects must give room for 'learning how to learn'.

In Southern Africa we found that a chosen target group, namely migrant workers in Botswana, has a very strong need for training and organisation. But the selection of participants is so difficult, and so many of those who have been trained drop out of union activity, that the project has little effect. It is an example of how important, and difficult, it is to find the appropriate form and content for an education programme, particularly when the political situation is unstable, and how the lack of preparation groundwork has made the training ineffective. Under such circumstances project staff need not only professional competence in education, but also good insight into the cultural and political situation. Continued support should depend on the strengthening of the project and on efforts being made to renew negotiations with the government, perhaps with the support of other development agencies.

The projects in Zimbabwe have suffered from the pressures of political transition and weaknesses in the newly-created national trade union centre. It has been difficult to find relevant forms of education: standardised courses are bound to fail since recruitment will change from time to time and from place to place. The very concepts of a course and training centre may be misleading.

A better alternative may be to establish a network of people in different locations and organisations. From a regional centre, perhaps affiliated to a NORAD mission or an ILO office, people and resources could be allocated to local level. From local and national level people could be recruited as trainers and organisers, perhaps spending some time at the regional centre or in Norway. To cooperate with such a regional network the relevant organisation in Norway might not be an international school but a flexible group of development advisors and trainers (see end of section 9.9).

Our conclusion is that the LO-supported projects should be more specific in terms of the target groups to be covered, and

methods which are appropriate. It is essential that the courses should start from the actual situation - the life and work - of participants in union training. Western workers' education should not merely be modified for third world context, or general union courses be modified for a women's programme. This applies both to the general planning of courses and the development of specialised, relevant, and accessible materials. It is appreciated that it takes time to develop locally-relevant training materials and aids. Without exception trade union education programmes should include the element of building-up local competence in developing appropriate materials. At the same time there is a general need to update some aspects of the training programmes to encompass new trends affecting industrial workers in particular, e.g. the internationalisation of production, the export of health hazards, new technology.

#### 9.4 WOMEN IN TRADE UNIONS

It is perhaps unrealistic to expect that trade unions would have a very different attitude towards women than the society of which they are part. Be that as it may, women certainly face inequalities and the same struggle in the union as they do in society. This may be seen not only in the situation of individual women, but in the relative importance given to women's courses, women's departments, and women's committees. It has often been the case that while on paper a women's programme may receive high priority, this does not happen in practice.

The team observed that women's programmes tended to be more vulnerable to political intervention; that where education programmes already existed for men, this did not necessarily help with starting women's programmes, and sometimes had an adverse effect; that in some cases women's education became the victim of its own success, for when women began gaining

confidence and asserting themselves, hostility was aroused in some sections of the male leadership.

There is an obvious need to support the struggle women are facing to improve their representation and influence in the trade unions in all the countries visited. It is recommended that monitoring of women's programmes be given special attention. It would seem advisable to place an experienced women adviser within the larger programmes, and in general to have more frequent visits from regional or headquarter advisers. The advisers would act as a support and reinforcement for the women organisers while remaining sensitive to their wishes and methods.

#### 9.5 RESEARCH AS PART OF TRADE UNION LEARNING AND DEVELOPMENT

Only two of the projects we visited have an explicit research component, namely the Jamaica centre and the employment promotion project in South East Asia. In separate chapters we have discussed what sort of research we find relevant. At this point we only want to repeat that what we are recommending for further support is not traditional academic research: it is action-oriented, interdisciplinary research and concrete development work linked to education, organising and other key trade union functions. There are many good examples over the last twenty years of trade unions, including the LO, gaining experience in the constructive use of research as an important support function.

In the employment promotion project in Malaysia and Indonesia we faced two types of problems. One was the degree of relevance of the research for the national unions and their members, especially questionable in Indonesia. In both countries this could have been improved by more advice from competent organisations like the ICFTU, the ILO, and national research centres. A first step towards a higher degree of relevance would be to establish closer links between research and

education. If no such links exist even the best education programme may deteriorate, and research turns into the collection of data for its own sake.

A second type of problem is how to involve national and local leaders and rank and file members in union-related research. The IO has considerable experience in action research through projects on industrial democracy, work improvement and information technology since 1962. It is of relevance to unions in developing countries, but unfortunately we saw little or no transfer of learning from these and similar projects to the ones sponsored through the ICFTU.

In the case of Jamaica, modest and concrete steps could be taken to deal with both types of problems. The first step would be to use the training courses as a basis for the collection of field data on training, the work environment and bargaining practices.

#### 9.6 PROJECT INITIATION AND PREPARATION

If we had been in any doubt about the importance of planning and preparation in ensuring the successful outcome of a project, this evaluation would have convinced us. In a number of cases project proposals and documents were quite inadequate. In a few cases there were no documents at all setting out objectives, procedures, and expected outcome. Even lengthy documents with long lists of objectives often missed out on operational guidelines for the implementation of the underlying development strategy.

This situation must be improved and we suggest that the IO sets up a project formulation group. The importance of preparatory groundwork, and pre-project research if necessary, should be stressed, not only the presentation of a project in a clear and logical manner. This not only assists in the smooth functioning of the project but in the evaluation of progress made.

## 9.7 PROJECT IMPLEMENTATION

Regional and grass-roots or shop floor activities are not always given a high enough priority. Cadre-building as a deliberate objective is often missing. A practical consequence of this is the lack of follow-up to many courses: union members attend a seminar, are hopefully informed and enthused, and then often they hear nothing more.

Almost without exception, the personnel of the projects we visited were over-worked and over-stretched, often being expected to work on more than one programme so that they were split in different directions and unable to concentrate their energies. In some cases, inadequate administrative systems were resulting in the educators wasting their educational skills and training. It is to be regretted when project organisers are so constantly busy that they do not have time to pause and reflect on their work and its effects.

The shortage of funds is obviously a critical factor, and the ideal solution in a number of cases would be the appointment of more staff. But a number of measures could be taken to make better use of existing staff: jobs could be designed or adjusted to avoid unrealistic expectations by employers, and to coordinate project needs with staff skills. It is also important that there should be an adequate back-up system for the staff from relevant committees and union officials (also international advisers, if any, in the locality).

Recognition should also be made of the fact that the experience gained running a project - planning a course or doing some research - may be as valuable as the stated objective of the project. A skills-training element for the organisers and time for reflection should be built into projects where possible.



## 9.8 PROJECT MONITORING AND EVALUATION

Problems with the supervision and monitoring of projects were frequent, not that the agencies were unaware of these. The team came across a number of instances both in South East Asia and in Southern Africa where timely cautions had been given or questions raised but without practical effect. The LO and the ICFTU must work out what degree and manner of commitment they require with regard to monitoring and supervision, and help the field agencies build this into their project proposals and budgets. It should not be possible, for example, for a grant to remain unspent, nor spent on the wrong target group just for the sake of spending.

Monitoring helps those involved with a project to judge how its progress matches up with the operational strategy they have planned. It can also make a significant contribution to the final evaluation of a project, an area where we also saw weaknesses in spite of much reference to the importance of evaluation. Most courses ended with an evaluation element but in few cases could we see how previous evaluations had been integrated into the development of a project.

## 9.9 CHOICE OF COUNTRIES, TYPES OF PROJECTS, AND CHANNELS OF AID

These three choices are closely related. Most of the projects so far sponsored have been initiated on the basis of the needs given priority by the ICFTU. A few projects, like the one in Jamaica, have been initiated and monitored by the LO quite independently. Obviously the LO cannot maintain an international information network on the scale of the ICFTU, neither can it have the same level of international expertise. This must not mean that the LO should leave it to the ICFTU to make the policy decisions which only the LO can make, according to the NORAD framework contract.

Notions of establishing a presence or competing with other organisations or countries should not of course enter into consideration when countries and projects are being selected.

The team is of the opinion that the LO should avoid co-operation with trade unions which are susceptible of infiltration and undue state intervention. Adding extra complications to difficult development work should be avoided at a time when experience and competence are being built up. It is strongly advisable to choose free and independent trade unions as partners.

Our general impression is that a concentration of LO-channelled support would be advisable in the form of at least one bilateral project in each major region of Southern Africa, South East Asia and perhaps South America and the Caribbean region. The choice of countries should be guided by Norwegian aid policy. Southern Africa should have priority since several countries there are already major recipients of Norwegian aid. A bi-lateral project there, however, should not start with the purchase of buildings like the Zimbabwe Labour College. Systematic pre-studies, firm links with trade unions in the region, and the training of people to run the project must come first. A concentration of effort does not mean that projects like the JTURDC should be terminated simply because Jamaica is not a major aid partner. Major investments have been made and encouraging results achieved after several years of trial and error.

When the LO has to make a critical choice between projects in different countries, we suggest that the poverty criterion should be only one of several to be used. A project oriented towards aid to women, for example, may not be possible in some of the poorest countries, but such projects in other countries may contribute to learning how to reach women in poorer countries.

The NORAD contract restricts the LO-sponsored projects to trade union education, but we suggest that it should be more flexible in terms of the technical content of projects. Education should indeed come first, but the agreement could allow for action-oriented research and 'social and related activities' to be included, especially when it is judged that they might prepare the way for or complement an education programme. A specific amount could be ear-marked for such purposes in the next contract.

Different types of projects may support LO-sponsored trade union education. One example might be a proposal which has been discussed in Indonesia to seek LO support for a productivity project, but the evaluation team cannot endorse this idea. The LO must first be convinced that concentrated efforts through the general education programme have reached a certain level of success. Even then a productivity project is politically a very sensitive matter for trade unions in Indonesia.

If the LO should decide to give high priority to the establishment of its own international trade union school this will probably (because of limited funds) reduce the involvement in bi-lateral projects in two or three regions. It may also mean a limitation of resources for more direct involvement in ICFTU projects. We have in a separate chapter expressed some scepticism regarding the school project.

An alternative to the school could be the group model mentioned in connection with the network approach in Southern Africa. A support group of this nature could be attached to the LO (or the AOF or Sørmarka). It would need members with complementary competence in organising, education, action-oriented social research, and other aspects of development aid. At least one of them should have personal experience of projects for women. The group would participate in project preparation, implementation and follow-up. Part of the time members would work in developing countries or regions, part of the time in Norway. Members of the group coming from unions and professional

centres in Norway as well as from developing countries could be attached to the group on a semi-permanent or short-term basis. This would mean that the group would vary in size, perhaps from 3-5 up to 10 or even more during special learning events.

In considering the terms of the third agreement, NORAD and the LO might give some thought to the project approach. In the first instance, we believe that project size is a critical factor. Projects should not be over-large in relation to their organisational base, nor of such a size and scope that reliance on outside support is bound to continue for a considerable time. More generally, we wonder if the project approach is the most appropriate form of aid relationship, especially when dealing with trade unions. Perhaps some alternative forms might be discussed.

#### 9.10 THE ROLE AND FUNCTION OF THE ICFTU

Given the brevity of team members' visits to the ICFTU offices in Brussels, we do not consider ourselves to be in a position to make a detailed examination of its decision-making procedures and administrative structure. Most of our comments relating to the ICFTU are contained in sections of the evaluation dealing with individual projects.

We are, however, aware of the significant role played by the ICFTU in the initiation and implementation of most of the multi-lateral projects funded by the LO. The development of this side of the ICFTU's work has taken place over a number of years and has grown recently as a result of financial support being made available from a number of governments via their national trade union centres.

The ICFTU has played an important role in coordinating some of these funds. This coordination enables the ICFTU to bring together more than one national centre to support the same project, as is the case with the women's training programme in

South East Asia, where the LO and the Dutch FNV are both funding the project. The pooling of resources also has the advantage of being more cost-effective given that each national centre will not be administratively responsible for the implementation of each project it supports. The ICFTU is in the position to build up a cadre of experienced staff and a data bank of resource material needed to support a highly complex operation given all the variables existing in each country where projects are established.

In order adequately to fulfill the time-consuming and sensitive tasks of project preparation, monitoring and evaluation the ICFTU needs more staff and some internal reorganisation. It is clearly under-staffed in relation to the programme it has undertaken or carry out on behalf of the LO, and also suffers from inadequate coordination between the different departments which carry out work in the same country or region. There is a need for a corporate development strategy for the channelling of assistance by its different departments. These measures would also hopefully facilitate closer liaison between the ICFTU and the LO.

#### 9.11 THE LO-NORAD FRAMEWORK AGREEMENT

In its statutes the LO has a clear mandate to show solidarity with sister organisations in other countries and to help them develop. This could easily be reflected in a preamble to the contract and would be very helpful when formulating objectives, inputs, activities and expected outputs.

The first NORAD-LO contract said nothing about purposes and objectives. The second contract is more explicit, although we cannot agree with all the conditions, but it is still too general. Its formulation could fit any non-governmental organisation whereas it should be tailored to fit the LO and its particular relationships.

The LO needs to work out its own policy guidelines for its international programme. The evaluation team felt that a lot of the project implementation flaws we saw were due to insufficient preparation. The LO and NORAD must share responsibility for defining terms of reference which require pre-project preparation and well-planned project proposals.

The agreement is and must be quite specific regarding reporting schedules and routines, accounting systems, consultation guidelines, etc. The agreement institutes consultation routines at headquarter level, but it is in the field that there are inadequate procedures for contact and exchange of information.

The clause that 'activities must be carried out in agreement with central and local authorities in recipient countries' should be reformulated. It cannot be applied to all countries and contradicts the concept of a free and independent trade union movement.

The administration component allowed in the agreement is 3% of the total grant, or NOK 200,000 per annum. In a budget paper (18.11.83) the LO says that it spends about NOK 500,000 a year on administration in Norway. We have not been able to verify this amount, which corresponds to 7,5%, but it seems reasonable that the amount allowed should be raised to 5%. Specific changes must of course be based on closer analysis and subsequent negotiations.

It is important that NORAD should assist the LO in developing its competence as an agency for administering development aid. Funds are needed for this purpose, beyond what is included in project budgets and overheads. The LO should be invited to formulate plans for the creation of at least two positions, one to assist in the planning and evaluation of development projects, the other to perform liaison duties between the LO, the ICFTU, and field projects. The LO might also consider some internal reorganisation, for example concentrating its aid personnel in one secretariat.

It would be helpful in the development of the LO's expertise for it to take steps to learn from other organisations with extensive overseas experience. In Norway this might include NORAD, Norsk Folkehjelp, and some research institutions; internationally, organisations like the ILO could be consulted extensively, particularly since the LO is already involved in 'multi-bi-projects' under ILO.

The total amount of NOK 20 million for three years is not sufficient to run a high quality programme of the same volume as the present one. Inflation and currency changes have in fact reduced the annual budgets considerably since 1980, when the first agreement was signed. If the LO, ICFTU and other collaborating organisations are going to implement the major improvements proposed in our report, the total budget may need to be doubled over the next three years. This would have to be done step by step, on the basis of annual progress reports, where corrective measures as well as strategic plans become integrated in the monitoring and evaluation process.

#### 9.12 DEVELOPMENT AND DEPENDENCY

This is not the place for an essay on the problem of dependency but we urge the funding agencies to remain aware of the pressures being placed on national unions when their education programmes are funded from outside. In specific terms this may lead to the design and location of courses being geared to the outside funder, and in a more general sense there may arise the anti-developmental attitude which believes that local resources can never be enough, that outside experts must be better, and that more money will solve difficulties. NORAD and the LO should be vigilant that local motivation is maintained, local skills are developed, and that projects are appropriate to local conditions.





A P P E N D I C E S

APPENDIX

---

NORWEGIAN AGENCY FOR INTERNATIONAL DEVELOPMENT  
(NORAD)

## K O N T R A K T

mellom

DIREKTORATET FOR UTVIKLINGSHJELP  
(NORAD)

og

LANDSORGANISASJONEN I NORGE  
(LO)

1. NORAD skal med forbehold om Stortingets bevilgninger yte tilskott til Landsorganisasjonen i Norge, heretter kalt Organisasjonen, med inntil 20 mill. kr. i perioden 1980-82. Tilskottet fordeles anslagsvis med 6 mill. kr. i 1980, 6,5 mill. kr. i 1981 og 7,5 mill. kr. i 1982. Udisponert beløp kan overføres fra et år til neste.
2. Organisasjonen forplikter seg til å yte en egenandel på minst 20% av det totale rammeprogram-beløpet pr. år.
3. Inntil 3 prosent av det totale rammebeløpet kan brukes til organisasjonens hjemmeadministrasjon.
4. Støtten gis på følgende betingelser:
  - 4.1 Investering i og driften av prosjektene skal skje i forståelse med sentrale/lokale myndigheter i mot-takerlandene.

---

DIREKTORATET FOR UTVIKLINGSHJELP  
(NORAD)

- 4.2 Driften av prosjektene skal skje på en slik måte at den kommer den stedlige befolkning til gode uten hensyn til rase, tro eller oppfatning.
  - 4.3 Forholdene ved prosjektene skal legges til rette for at ansvaret for og driften av prosjektene så snart som mulig skal overtas av sentrale/lokale myndigheter eller lokale organisasjoner i mottakerlandene. Herunder skal Organisasjonen forplikte seg til å sørge for opplæring/utdanning av lokalt personell med sikte på å kvalifisere slikt personell til å overta administrasjonen av prosjektene.
  - 4.4 Organisasjonen skal sette utbetalt støttebeløp inn på en egen rentebærende bankkonto.
  - 4.5 Organisasjonen skal holde NORAD underrettet om hvem som skal revidere regnskapene for prosjektene. Norsk og/eller utenlandsk revisor skal være statsautorisert eller registrert.
5. Organisasjonen skal:
- 5.1 Innen utgangen av oktober måned hvert år fremlegge for NORAD til godkjenning forslag til aktiviteter for kommende år. Forslaget skal inneholde kostnadsoverslag og tidsramme for gjennomføring av de enkelte tiltakene.
  - 5.2 Innen utgangen av april måned hvert år oversende NORAD årsrapport som beskriver de aktiviteter som er utført samt angir endringer i forhold til den oppsatt tidsramme og kostnadsoverslag. Det skal vedlegges en revisorerklæring i samsvar med Vedlegg I til denne kontrakt. Såfremt NORAD måtte ønske det, skal alle originalbilag utleveres for kontroll.

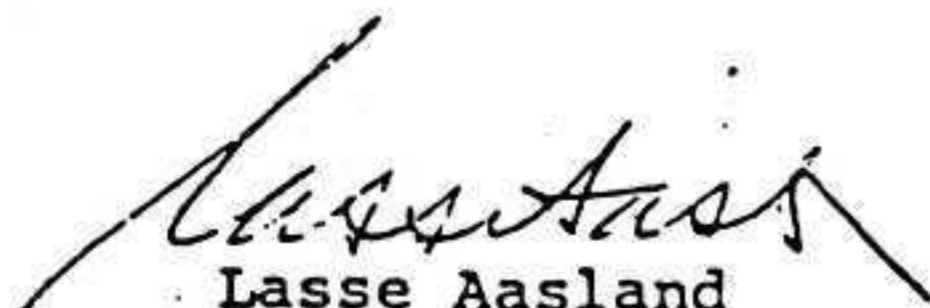
---


DIREKTORATET FOR UTVIKLINGSHJELP  
(NORAD)

6. De årlige støttebeløp inklusive støtte til hjemmeadministrasjon fastsettes av NORADs styre og overføres forskuddsvis på grunnlag av godkjente forslag til virksomhet, fjr. punkt 5.1.
7. Prosjektene skal holdes forsikret så langt dette er mulig.
8. Partene er enige om at virksomheten skal skje i kontakt og samarbeid med NORAD. Halvårlige møter mellom NORAD og Organisasjonen avholdes tilpasset de frister som er nevnt i pkt. 5.1 og 5.2, og elelrs i den utstrekning en av partene finner nødvendig.
9. NORAD vil kreve hel eller delvis tilbakebetaling av støtten dersom Organisasjonen misligholder sine forpliktelser etter denne kontrakt.

Denne kontrakt er utarbeidet i to eksemplarer, ett til Organisasjonen og ett til NORAD.

Oslo, den 7. januar 1980

  
Lasse Aasland  
Avdelingsdirektør  
Direktoratet for  
utviklingshjelp  
(NORAD)

  
Tor Halvorsen  
Formann  
Landsorganisasjonen  
i Norge



---

DIREKTORATET FOR UTVIKLINGSHJELP  
(NORAD)

K O N T R A K T

mellom

DIREKTORATET FOR UTVIKLINGSHJELP  
(NORAD)

og

LANDSORGANISASJONEN I NORGE (LO)

1. NORAD skal med forbehold om Stortingets bevilgninger yte tilskott til Landsorganisasjonen i Norge, heretter kalt Organisasjonen, med inntil 20 mill. kr. i 1983 - 1985. Tilskottet fordeles med 6,7 mill. kr. i 1983, 6,6 mill. kr. i 1984, og 6,7 mill. kr. i 1985. Udisponert beløp kan overføres fra et år til neste.
2. Tilskottet skal anvendes til opplærings- og utdanningsvirksomhet for personell tilknyttet fagbevegelsen i utviklingsland. Premisser for anvendelsen av støtten er gitt i Vedlegg I.
3. Organisasjonen forplikter seg til å yte en egenandel på minst 20% av det totale rammeprogram-beløpet pr. år.
4. Inntil 3% av det totale rammebeløpet kan brukes til Organisasjonens hjemmeadministrasjon.
5. Støtten gis på følgende betingelser:

---

DIREKTORATET FOR UTVIKLINGSHJELP  
(NORAD)

- 5.1 Tiltakene skal gjennomføres i forståelse med sentrale/lokale myndigheter i mottakerlandene.
  - 5.2 Tiltakene skal gjennomføres på en slik måte at de kommer den aktuelle målgruppen til gode uten hensyn til rase, tro eller oppfatning.
  - 5.3 Forholdene skal legges til rette slik at ansvaret for tiltakene så snart som mulig skal overtas av sentrale/lokale myndigheter eller lokale organisasjoner i mottakerlandene. Herunder skal Organisasjonen forplikte seg til å sørge for opplæring/utdanning av lokalt personell med sikte på å kvalifisere slikt personell til å overta administrasjonen av tiltakene.
  - 5.4 Organisasjonen skal sette utbetalt støttebeløp inn på en egen rentebærende bankkonto.
  - 5.5 Organisasjonen skal holde NORAD underrettet om hvem som skal revidere regnskapene for tiltakene. Norsk eller utenlandsk revisor skal være statsautorisert eller registrert. Erklæring fra revisor (Vedlegg II) skal oversendes NORAD sammen med årsrapport over virksomheten.
6. Organisasjonen skal:
- 6.1 Innen utgangen av oktober hvert år fremlegge for NORAD til godkjenning forslag til aktiviteter for det kommende år. Forslaget skal inneholde kostnadsoverslag og tidsramme for gjennomføring av de enkelte tiltakene.
  - 6.2 Innen utgangen av april måned hvert år oversende NORAD samlet årsrapport som beskriver de aktiviteter som er utført, samt angir endringer i forhold til den oppsatte tidsramme og kostnadsoverslag. Det skal vedlegges en



---


DIREKTORATET FOR UTVIKLINGSHJELP  
(NORAD)


revisorerklæring i samsvar med Vedlegg II til denne kontrakt. Såfremt NORAD måtte ønske det, skal alle originalbilag utleveres for kontroll.

7. De årlige støttebeløp overføres forskuddsvis på grunnlag av godkjente forslag til virksomhet, jfr. punkt 6.1.
8. Tiltakene skal holdes forsikret så langt dette er mulig.
9. Virksomheten skal skje i kontakt og samarbeid med NORAD. Halvårlige møter mellom NORAD og Organisasjonen avholdes tilpasset de frister som er nevnt i pkt. 6.1. og 6.2., og ellers i den utstrekning en av partene finner nødvendig.
10. NORAD vil kreve hel eller delvis tilbakebetaling av støtten dersom Organisasjonen misligholder sine forpliktelser etter denne kontrakt.

Denne kontrakt er utarbeidet i to eksemplarer, ett til Organisasjonen og ett til NORAD.

Oslo, den 9. februar 1983

  
Kristen Christensen  
Avdelingsdirektør  
Direktoratet for utviklingshjelp  
(NORAD)

  
Tor Halvorsen  
Formann  
Landsorganisasjonen  
i Norge (LO)



---

DIREKTORATET FOR UTVIKLINGSHJELP  
(NORAD)

Vedlegg I til  
kontrakt av 9. februar 1983  
mellom NORAD og  
Landsorganisasjonen  
i Norge (LO)

---

Den foreliggende kontrakt er en forlengelse av kontrakt av 7. januar 1980 for perioden 1980-82 mellom NORAD og Landsorganisasjonen i Norge (LO).

Til grunn for kontrakten ligger følgende vedtak fattet i NORADs styre 14. desember 1982:

"Landsorganisasjonen i Norge gis tilsagn om inntil kr. 20.000.000,- som rammeavtalebeløp for 1983-85."

Vedtaket ble gjort på følgende premisser:

- Avtalen skal omfatte faglig opplærings- og opplysningsvirksomhet, herunder arbeidsmiljøspørsmål.
- Det skal i noen grad tilstrebes geografisk konsentrasjon og tiltakene må ha en klar forankring i samarbeidende organisasjoner.
- Det stilles krav om at organisasjonens forpliktelser angående kontroll og oppfølging ved FFI-prosjekter gjennomføres i et større omfang enn tidligere praksis.
- Det skal innen 1984 gjennomføres en uavhengig evaluering av både bilaterale prosjekter og prosjekter kanalisert gjennom FFI.
- LO gis adgang til å søke NORAD om tilskott til prosjekter med annen profil enn faglig opplæring.

---

DIREKTORATET FOR UTVIKLINGSHJELP  
(NORAD)

Søknader om slik støtte vurderes og forvaltes på vanlig måte i henhold til retningslinjene for støtte til private organisasjoner og faller utenfor rammeavtalen.

- Det gis ingen tilleggsbevilgninger i løpet av perioden.

---

## TERMS OF REFERENCE

For the evaluation of training projects in trade union activities financed under the framework agreement between NORAD and the Norwegian Federation of Trade Unions (LO).

### I: Background

Since 1980, the Norwegian Federation of Trade Unions (LO) has had a framework agreement with NORAD concerning support to development projects. The first agreement covered the period 1980-82, and the second 1983-85. For both periods, the framework budget has been NOK 20 millions.

Two different channels of assistance are applied, each absorbing approximately one half of the available resources. One is LO's bilateral projects, implemented directly by LO in collaboration with local trade unions in four countries: Tanzania, Egypt, Portugal and Jamaica. The other category is multilateral in the sense that the International Confederation of Free Trade Unions (ICFTU), the international organization to which LO is affiliated, is the co-ordinating and implementing agency, in collaboration with local trade unions. These projects have been distributed between more than 20 countries. LO's function as regards these projects consists for its major part of submitting the projects to NORAD for approval and later keeping NORAD informed about the progress and accounts of the projects.

During the first 3-year period, the funds were distributed between projects aiming at socio-economic development and those aiming at trade union training and organization-building. For the present 3-year period, funds from the framework agreement are only available for trade union training purposes, whereas LO may apply for support to socio-economic projects outside of the agreement.

This evaluation will also be limited to trade union training projects, both multilateral and bilateral, with an additional

---

particular focus on training courses for third world union leaders carried out in Norway.

## II: Mode of work

Prior to the team evaluation, a desk study will be conducted intending to give a profile of each of the local trade union partners through which ICFTU and LO projects are executed, and also describing the general conditions for trade union activity in their respective countries. This study will be carried out by the Norwegian Trade Union Centre for Social Science and Research (FAFO) on a consultancy basis. Particular terms of reference have been made for this task (see annex 1).

The evaluation will be done by a team with the following composition:

- Prof. Einar Thorsrud, Team Leader
- Ms. Helga Trulsrud
- Ms. Britha Mikkelsen
- Dr. Nitish R. De
- Mr. Ketil Nordahl
- Mr. Alan Leather (Secretary of the Team)

The basis of the evaluation will be the pre-study, study of background material, visits to LO and ICFTU, field visits to a selection of countries, interviews with presence and observations from seminars, former participants in training courses, and the team's own professional experience, knowledge and judgement.

With regard to field studies, the evaluation team should be introduced by LO and/or ICFTU to the national/local trade unions.

South-East Asia with field visit to Indonesia and Malaysia:

1980/NOR/AS/III and

1982/84/NOR/AS/VII (Trade Union Training/Indonesia)

1981-82/NOR/W/I and

1983/NOR/W/I: (Training for women trade unionists/South East Asia)

1983/NOR/AS/II: (Employment promotion programmes with national unions/Asia)

Southern Africa with field visits to Botswana and Zimbabwe:

1983/NOR/AFR/II (Migrant Labour Training/Botswana)

1982/NOR/ITS/VI (Organizational campaign, leather workers/Zimbabwe)

1983/NOR/AFR/III (Labour College/Zimbabwe)

1983/NOR/AFR/VI (Seminar (in Norway) for trade unionists/Zimbabwe)

1983/NOR/W/III (Courses for women trade unionists/Zimbabwe)  
(Seminar (in Norway) for organizers in trade unions/Southern Africa)

Jamaica:

888/J/o - Trade Union Centre

In addition, representatives of the team will be present as observers at two courses given at the International Trade Union School, Sørmarka, Oslo:

Southern Africa (881/LO/3-4/84) September 1984

Viking/Malaysia (881/LO/3-5/84) October 1984

(The Team is invited to visit the factory and the local trade union if time so permits).

Depending on time limitations or other circumstances, the evaluation team will have the opportunity to make a selective

concentration among the projects listed above. The criteria and reasons for such concentration should be stated in the Report.

The evaluation will partly be related directly to the particular projects selected for field study, and partly give a more general assessment of the activities covered by the framework agreement.

### III: Tasks of the evaluation team

#### 1. Quality of the training projects evaluated through field visits

The evaluation team shall:

- 1.1 Evaluate the general objectives, design and relevance of projects.
- 1.2 Review the projects compliance with NORADs principles for support to NGOs, particularly the principle of non-discrimination regarding race, religion and political views, as well as with Norwegian Parliamentary decisions regarding support to labour organizations.
- 1.3 Give a general assessment of the outcome of each of the projects selected for case evaluation in terms of achievement of their objectives.

The following issues should be assessed in greater detail, depending on the nature of each project:

- 1.3.1 Review how the needs for the training projects were assessed, and how and by whom the training priorities were decided: as well as the criteria for selection of participants and local versus expatriate lecturers.
- 1.3.2 Make an assessment of curricula, study material, teaching methods, and the pedagogical standards of the projects with a particular view to local conditions.



---

### 1.3.3 Evaluate the effects on participants, i.a.:

- stating increase in union activity after the courses (unorganised who became union members, passive members who became active, active who became even more active and accepted more responsible offices etc.)
- giving examples of union activities initiated by participants
- stating to which degree former course participants still are active in trade unions, as well as turnover to management or official administrative jobs.

### 1.3.4 Evaluate the effects on organizations, i.a.:

- informing about possible increase in number of members in the unions
- informing about possible increase in degree of organization, i.e. proportion of organised workers out of the total number of workers in the relevant area of the labour market (also in comparison to other relevant organizations)
- giving examples of increased capacity in union work which can be traced back to the training projects, e.g. in terms of better wages or other conditions of employment, generation of new local organizations, strengthening of existing local organizations, negotiations conducted, educational work, mobilizations of members on particular questions, actions against or together with other organizations or authorities
- discussing the effects on internal democracy and participation in the union

- discuss political and economic conditions in the country which may have effected the results of the project.

## 2. Suitability of the channels of assistance

The evaluation team shall:

- 2.1 Make a general assessment, on the basis of the pre-study, of the choice of local partners and of the relevance and suitability of the various projects in the light of the general climate for trade union activity described in the pre-study.
- 2.2 Review how the projects were initiated and came about, how and by which parties they were planned, and in general the roles of the local partners, ICFTU and LO in decision-making, planning and execution of the projects, and that of NORAD as a supporting agency.
- 2.3 Assess the channels for transfer of money and other resources and the accounts of the organizations studied, in order to assure that they reach their intended receivers.
- 2.4 Discuss the rationality of supporting the actual number of countries and projects through the framework agreement, vs. a major concentration.
- 2.5 Review the composition of costs in the projects, i.e. share of the budgets dedicated to administration and overhead expenses, travels, accomodation etc. versus direct training activities. The relative importance of expenses to expatriate assistance should also be indicated.
- 2.6 Discuss the relevance and cost-benefit aspects of establishing an international trade trade union training centre in Norway, as compared to strengthening training activities in third world countries.

- 
- 2.7 Make a general and comparative assessment of the various training projects which take place under the framework agreement: Projects executed through ICFTU, projects executed bilaterally by LO, and courses in Norway.

3. Trade unions and development

The evaluation team shall:

- 3.1 Assess the relevance and effect of the training projects with regard to strengthening the role of the trade unions in their efforts to promote more egalitarian social structures.
- 3.2 Assess which social strata that benefit directly or indirectly (potentially) from the projects and from a general strengthening of the trade unions.
- 3.3 Discuss possible alternative ways of strengthening the trade unions with the ultimate aim of raising the social position and standard of living of non-affluent groups.
- 3.4 Discuss the cultural and political value-content which may be said to be inherent in the projects, in relation to the variety of interpretations of these values in the local trade union environment, and assess the problems faced by the donor organizations in adapting these values to local conditions.
- 3.5 Discuss the role of labour organizations and trade union activity in the general economic, social and political development process of third world countries and particularly in the case of the study countries, in relation to the overriding principles for Norwegian development assistance and to NORAD's principles for support to NGOs (cf. 1.2.).

## IV: Reporting

A draft report, containing the main conclusions and recommendations, shall be finished before the team splits up.

The team shall submit the final report to the Ministry of Development Cooperation, no later than 15 November 1984.



Helge Kjekshus

Head of Division

The Royal Norwegian Ministry of Development Cooperation

LIST OF CONTACTSThailand (stop-over en route by Ms. Britha Mikkelsen)

Manuel A. Dia, Regional Adviser, Workers Education,  
ILO, Bangkok

V. Conel, ICFTU representative, Bangkok

B. Majundar, ICFTU adviser, Bangkok

Eddy Lee, Director, Asian Regional Team for  
Employment Promotion (ARTEP), Bangkok

Per Rønnäs, ARTEP

Malaysia

M. Sebastian, Executive Director, Workers' Institute  
of Technology, Kuala Lumpur

I.S. Perkins, Study Circle Coordinator, ITGLWF,  
Penang

Muftar Husin, Personnel Manager, Viking Askim,  
Penang

N. Balakrishnan, Study Circle Coordinator, IRGLWF,  
Penang

A. Navamukundan, National Executive Secretary, National  
Union of Plantation Workers (NUPW)

D.P.A. Naidu, Director of Education, NUPW

Ms. T. Pathma, Chairperson, Women's Committee, MTUC

Ms. Ching Chabo, Assistant Secretary (Research), MTUC

Dr. Paul Chan Tuck Hoong, University of Malaysia

Tamba E. Yambasa, Director of Research, Sierra Leone  
Labour Congress

Ms.  
Pauline Khoo Guat Heow, General Staff Union

D. Paul, Assistant Secretary (Administration)  
MTUC

M. Ramachandran, Secretary, MTUC, Penang

Ms. Grace Ng Lew Lan, Assts. Secretary, Rubber Research  
Institute of Malaysia Union

Ms. Rose Mohammed Raozi, Bank Employees Union, Penang

M. Thanga Veloo, Electrical Industry Workers Union,  
Penang

Zainal Rampak, Deputy President, MTUC  
 A.J. Patrick, Vice President, MTUC  
 K. Naranyanan, University of Malaysia  
 C. Mohan Sahabat, Alam Malaysia  
 M. Rajendran, Consumers' Assn. of Penang

Indonesia

Mr. D.H. Dean, General Manager, P.T. Beecham  
 Pharmaseuticals, Indonesia  
 Bjørn Strøm, ICFTU Programme Director, Jakarta  
 A. Sudono, President, FBSI  
 Mr. Sukarno, Vice President, FBSI  
 Mr. Syaiful, Deputy secretary, FBSI  
 M. Sinungan, Research, FBSI  
 Darno Amin, Pharmacy, FBSI  
 Mr. Narzuki, Textile Union  
 Mr. Fanzi, Branch Secretary, FBSI  
 Ms. Winarti Ismail, Women's Committee, FBSI  
 Eddy Makin, Tourism Union  
 M. Achmad, Textile Union  
 Ms.  
 Juniwati Tedjasukmana, Women's Committee, FBSI  
 Safren Nantooavi, Leather and Rubber Union  
 Ahif Sunasi, FBSI, local leader  
 Rias Effeud, Research, FBSI  
 Marhani Usman, FBSI  
 Achsin Naidy, FBSI  
 P.S. Muralamsjah, FBSI  
 Mr. Sakmin, FBSI  
 Abror Abdullah, FBSI  
 Mr. Sufferman, FBSI

Rellus Siagian,	FBSI
A.S. Hasibuan,	FBSI
Mr. Sudarmono,	State Minister
Helmy Salin,	FBSI Leader
Sri Wulam,	FBSI, Jakarta
Mr. Cahyan,	FBSI
Iskandar Umar,	FBSI
Mr. Handoko,	FBSI, Deki Jaya
A. Rayak,	Textile Union
Mr. Soekanto,	ICFTU Liaison Officer
Stella Angella,	FBSI, Head of Women's Department
Mr. Sodono,	Minister of Manpower
Soewarno Sjahery,	Chairman, Ehermgn Electronic, Jakarta Region
J. Washburn,	US Labour Attaché

Staff at NATIONAL (ELECTRONICS), Jakarta

Tosari Wijaya,	Education Coordinator, FBSI, in cooperation with ICFTU
Rahayu M. Sofwan,	Director of Women's Labour
James W. Shea,	AAFLI representative
Fauzi Abdulla,	Institute for Legal Aid

Jamaica

Lascelles H. Beckford,	Vice-President, BITU
Dwight A. Nelson,	Island Supervisor/Education Director, BITU
Michael Manley,	
Professor Rex Nettleford,	Director TUEI
Everett Allen,	Education Officer, JTURDC
Noel Cowell,	Research Officer, JTURDC
Elaine Ferguson,	Resources Co-ordinator, JTURDC

---

Barbara Gloudon,	Communications, JTURDC
Lascelles Perry,	Island Supervisor NWU
Vincent Morrison,	NWU
Derrick Rochester,	NWU
Hopeton Caven,	General Secretary, TUC
Trevor Waite,	Assistant General Secretary, TUC
Marva Phillips,	Education Officer, TUC
Garfield Belafante,	Research Officer, TUC
E. Lloyd Taylor,	General Secretary, JALGO
Helene Davis,	Education Officer, JALGO
Dr. Michael Witter,	UWI
Probyn Aitken,	Permanent Secretary, Ministry of Labour
Anthony Irons,	Industrial Relations Director
Carlyle Dunkley	
 <u>Zimbabwe</u>	
Jose Antonia Aguiriano,	Chief, Bureau of Workers' Activities, ILO, Geneva
James Othieno,	Director, ILO Office, Lusaka
Morris W. Mulima,	ILO Regional Workers' Education Adviser for Southern Africa, ILO Office, Lusaka
S.D.R. Chifamba,	Dir. of Education, Zimbabwe Congress of Trade Unions, Harare
Mr. Zharare,	Workers' Education Officer, ZCTU, Harare
Aaron Pemba,	Director of International Affairs, South African Congress of Trade Unions (SACTU)
Mr. and Mrs. A.S.L. Hartley,	Owners of Observatory Inn, Harare
Roger Falconer,	ILO Workers' Education Expert, Harare
Taniel Nangati,	Research Fellow, Labour Studies, ZIDS
Thandika Mkandawire,	Research Director, Zimbabwe Institute for Development Studies, ZIDS



---

Gertrude Mutasa,	Education Officer, ZCTU
Jeffrey Mutandare,	Vice President, ZCTU
Oliver Takuba,	Industrial Relations Officer, Government of Zimbabwe
Misheck Sibanda,	Deputy secretary, Minister of Labour
N. Onimyo,	General Manager, Johnson and Fletcher, Harare
Mr. Karimba,	Chief Industrial Relations Officer, Ministry of Labour
David Clement,	Commonwealth Trade Union Council
Vesla Vetlesen,	LO
Arne Semmerud	Secretary AOF
Martin Acquaye,	ICFTU representative
Charles M. Pasipanodya,	General Secretary, National Union of Clothing Industry
Florence Chitauro,	Secretary of Women's Affairs, ZCTU
Stig Blomqvist,	Education Officer, Miners' International Federation
Edward Muchenge,	Silveira House
George Makings,	Secretary, Zimbabwe Employers' Federation
Mr. Mongu,	Railway Workers' Union
 <u>Botswana</u>	
Helge Stange,	Assistant Resident Representative, NORAD
Ola Jensen,	Administrative Officer, NORAD
Kele Zidana,	ICFTU Representative in Southern Africa
Grey Atholang,	Migrant Labour Project
O.B.G. Suping,	Migrant Labour Project
Ms. Ina Kenairi,	General Secretary, BFTU
K.K. Motshidisi,	Commissioner of Labour
G.B. Makgoeng,	Deputy Commissioner of Labour
Chafuka Chihana,	Research Scholar (NORAD Scholarship)

---

A. Pule Zhebe,	Occupational Health Unit, Ministry of Health
Basile Selema Rose,	Occupational Health Unit, Ministry of Health
Ove Johansson,	ILO Expert, Migrant Labour Project, Maseru, Lesotho
G.W. Matenge,	Owner of Construction Co.
S.H.S. Makoni,	Executive Secretary, SADCC
Rose Siachitema,	BFTU Women's Committee
Kimberley Griffin,	Bank of Botswana
S.A.S. Makani,	SADCC, Executive Secretary
T. Sheahy,	SADCC
Patrick Balope,	M.P.
Arild Eik,	NORAD Resident Representative, Gaborone
B.C. Mthume,	Vice Chairman, BFTU
David B. Merementsi,	Botswana Railway Workers Union, Gaborone
L.K. Chikanda,	Botswana Meat Workers Union, Lobatse
Mrs. Mavis Mophuting,	Administrative secretary, BFTU
Mr. Molano,	Dept. of Sociology, University of Botswana

NORAD

Vegard Bye, Evaluation sector  
Ingunn Sauvik, NGO section  
Asbjørn Olsen, NGO section

LO

Kaare Sandegren  
Leonard Larsen  
Vesla Vetlesen

FAFO

Gudmund Hernes, Research Director  
Audun Gleinsvik  
Jens Grøgaard

AOF

Arne Semmerud, Secretary

ICFTU representatives

Mr. Enzo Friso, Assistant General Secretary  
Mr. P.H. de Jong, Head of Projects Administration and  
Coordination Department and Head of  
Asia Desk  
Mr. Steen Sillemann, Head of Education Department  
Ms. C. Lehnert, Head of Finance Department  
Mr. E. Horii, Deputy Head of Projects Administration  
and Coordination Department  
Mr. P. Fakun, Assistant Education Department  
Ms. Anna Oulatar, Africa Desk  
Mr. Andrew Kalembu, Africa Desk  
Mr. Ian Graham, Editor, Press, Publications and  
Communication Department  
Mr. J.L. Carlsen, Assistant Projects Administration and  
Coordination Department  
Mr. Bo Jonsson, Economic and Social Policy Department  
(Research)

Marcelle Dehareng,

Women's Bureau

Elsa Ramos,

Women's Bureau

---

**BIBLIOGRAPHY****A. General**

1. World Development Report, World Bank, 1984
2. World Labour Report, ILO, 1984
3. Asia Year Book, Honk Kong, 1984
4. A study of the Organizations and countries supported through the agreement between NORAD and LO by Jens Grøgaard et. al., FAFO, Oslo
5. Asian Outlook, 1983, ICFTU Asian Regional Organization
6. Stortingsmelding nr. 36 (1984-85). Om enkelte hovedspørsmål i norsk utviklingshjelp
7. Håndbok for evalueringsspørsmål, NORAD, 1981
8. Evaluation of the ICFTU Programme Co-financed through the FNV by the Dutch Ministry for Foreign Affairs / Development Cooperation, by E. van Es & P.G.H. Hopkins, Naarden, May, 1983
9. NORAD and Non-Governmental Organizations. Guidelines for Support to activities in Developing countries, May, 1983
10. Workers' Education Assistance to Women Workers in Central America and the Dominican Republic, Project Evaluation, ILO/DANIDA/79/RLA/32
11. Regional Project on Workers' Education and Occupational Safety and Health. Report from a Joint ILO/DANIDA Evaluation Mission Visiting the Caribbean from 4th-17th Jan. 1984
12. "Directing Multilateral Aid from the Outside: Donors Caught in a Quicksand Trap", International review of Administrative Sciences, No. 2, 1984, by K. Kreiner.
13. United Nations Handbook, 1984

---

**B. Malaysia**

1. Frederic F. Clairmote:  
"Malaysia: Development for whom?", Economic and Political Weekly, July 1, 1984
2. Khor Kok Peng:  
The Malaysian Economy: Structure and Dependence, KL, Institut Masyarakat, 1983
3. Khor Kok Peng:  
Recession and Malaysian Economy, Institut Masyarakat, 1983
4. Suara Malaysia Baruch:  
June 1984 issue M.T.U.C. Journal
5. Report of the Labour Force Survey, 1980, Government of Malaysia
6. Jamikah Grieffin:  
"Impact of Modern Electronics Technology on Women Workers in Malaysia; some selected findings from the Hanea survey" in International Symposium on Technology, Culture and Development, December, 1983, Honda Foundation
7. B. Datta Chaudhury:  
"The Role of Free Trade Zones in the creation of employment and industrial growth in Malaysia", ILO-ARTEP, Bangkok, 1982
8. Economic Report, 1983/84, Ministry of Finance
9. Mid-term Review of the 4th Plan (1982-85), Government of Malaysia
10. Malaysian Women, 1983, Consumers Association of Penang:  
-Problems and Issues
11. State of the Malaysian Environment 1983/84, Sahalat Alam Malaysia

---

C. Indonesia

1. An Overview of the socio-economic conditions of Indonesia as it faces Pelita IV, Research and Development Department, FBSI, 1984
2. An overview of Socio-economic conditions of Indonesia on the first year of Pelita IV, vols. I and II, Research and Development Department, FBSI, 1984
3. Numerous Monthly and Periodical Bulletins brought out by FBSI.
4. Report on Indonesia, ICFTU, May, 1984
5. LO-Sverige:  

Rapport från FFI-delegation till Indonesien,  
Filippinerna och Nya Zeeland, 27.Jan. -  
19.feb.1984
6. Labor Trends in Indonesia, May 1984, American Embassy, Jakarta
7. Bruce Glassburner, ed.:  

The Economy of Indonesia - Selected Reading.
8. Indonesian Workers and Their Right to Organise, 1981, INDOC

---

D. Jamaica

1. James Winston:

"The decline and fall of Michael Manley: Jamaica, 1972-80", Capital and Class, No 1, Spring 1983

2. Economic and Social Survey of Jamaica:

Planning Institute of Jamaica, Kingston, 1984

3. John Jackson:

"Improved profits made by companies", The Daily Gleaner, August 13, 1984

4. Michael Manley, Jamaica's Struggle in the Periphery, London 1982.

5. Michael Manley: The Politics of Change, London, 1974

6. Michael Manley: Voice at the Work Place, London, 1975

7. Michael Manley: The Search for Solutions, Canada, 1976

8. Jennifer Sharpley:

Economic Management and the IMF in Jamaica, 1972-80, Bergen, 1981



---

E. Zimbabwe

1. M.J. Matshazi, et al.:  
A survey of Workers' Education Activities in Zimbabwe, 1980-81, Scandinavian Institute of African Studies, Uppsala
2. Manpower Report, 1984, Ministry of Manpower Planning
3. Labour Relations Bill (Draft), 1984.
4. Olivia Muchena:  
Women's Organisations in Zimbabwe - An Assessment of their Needs, Achievements and Potential, in Women's Programmes in Zimbabwe, ed. KULU, Women and Development, Copenhagen 1982.
5. National Manpower Survey 1981, Ministry of Manpower Planning and Development, Govt. of Zimbabwe.
6. Zimbabwe Women's Bureau, "We carry a Heavy Load", Survey Report, Harare 1981.
7. An anti-labour Labour Bill - Zimbabwe, in South African Labour Bulletin, Vol. 8 No. 5, April 1983.

---

F. Botswana

1. Socio-Economic Development of Botswana, B.F.T.U., 1984
2. A. Colelough, et al.:  
The Political Economy of Botswana: A Study of Growth and Distribution, Oxford Press, 1980
3. The Budget Speech, 1984, P.S. Mmusi, Government Press, Gaborone
4. Bank of Botswana Bulletin, June, 1984
5. Lionel Cliffe:  
"A Critique of Botswana's Development Path" (Mimeo), University of Sheffield.
6. Bank of Botswana Annual Report, 1983.
7. Trade Unions and Employers' Organisations Regulations, 1984, Botswana Government Gazette, 28th September 1984.
8. National Employment Plan, 1979-85, Government of Botswana.
9. Māsire Big Victor at Polls, Africa News, September 1984.



