



**REPORT OF THE CAPACITY BUILDING WORKSHOP  
FOR THE RESEARCHERS OF ITUC- AFRICA  
AFFILIATES IN THE AREA OF SOCIO-ECONOMIC  
POLICY, HELD AT NAIROBI,  
KENYA ON 12 – 16 APRIL 2010**

April 2010

## 1. Introduction

ITUC -Africa organized the above workshop in line with its strategic plan of 2009 – 2012. This workshop occurred under Project 4 of this Strategic Plan, namely: ***Strengthening interventions in the area of economic and social policy***. Thirteen (13) participants representing ten (10) countries and twelve (12) affiliates, from English speaking countries attended the workshop. There were three facilitators and two support staff.

The primary objectives of the workshop were:

- *Development Objective* : To contribute towards human centred national economic and social policies that will ensure sustainable growth and development and lead to the effective reduction of poverty
- *Project Objective*: Strengthen the capacity of ITUC Africa affiliates to develop effective economic and social policies and to participate in social dialogue structures.

The Lome Headquarters in conjunction with the Nairobi liaison office coordinated the logistics and other arrangements towards the successful organisation of the workshop.

Activities

Day One Monday, 12 April

Opening and Welcome

Comrade Kouglo Lawson Body the Head of Economic research at ITUC Africa welcomed the participants and the facilitators to Nairobi and thanked the affiliates for their cooperation and in ensuring that the workshop proceeds as planned. Without the cooperation demonstrated by the affiliates none of the projects and programmes contained in the strategic plan would be successfully implemented

He then introduced the two facilitators comrades Grayson Koyi ex-labour researcher with the public sector union in Zambia, and now presently a lecture and researcher attached to the University of Zambia, Institute for research on labour and economic research; and Trywell Kalusopa labour officer at the Botswana Federation of trade unions and a lecturer at the University of Botswana.

Kouglo also informed the workshop that Comrades Victor Dogbevi head of ITUC - Africa's Finance department and Sylvan Kiza the coordinator of the Nairobi liaison office would assist with logistics and administrative issues. He then handed over to Cde. Kalusopa to facilitate the workshop.

Participants and facilitators introduced themselves, highlighting their involvement in the trade union and their participation and experiences in research more generally, and trade union/labour research in general. This was done in order to gauge the different skills and dynamics of the group in so far as this related to research.

Programme outline and objectives of the workshop

Thereafter Cde. Kalusopa gave an outline of the programme, touching on the different modules that will be presented, the key learning points of each topic and what to expect for the duration of the five days of the workshop. The Programme of the workshop is attached to this report as annexure 1

The outcomes of the workshop, he stated, were to share general research principles and methods with the view to ground these into specific and directed trade union work. Some of the thematic and conceptual issues that will be considered during the workshop were Decent work, poverty reduction strategy papers, The multilateral trade system and its rules, Millennium Development Goals, research, The global economic crisis and the jobs pact, research methods and procedures amongst others.

The ultimate objective was to ensure that capacity building of African labour researchers does not become a once off activity, but rather, a continuous and sustainable activity that will enable ITUC Africa and its affiliates to emerge with a future strategic approach to the trade union research agenda in Africa.

Participants were then requested to volunteer or nominate a chair of the group for the duration of the workshop and two rapporteurs for the day one morning and afternoon session. The chair will be responsible to ensure that the participants are properly coordinated and address concerns were these may arise. The rapporteurs will note salient activity points during the sessions, and report on these the following day.

#### **Presentation 1: Prof. Kouglo Lawson Body: Importance of trade union research in Africa**

Outline of the Presentation:

ITUC- Africa's' perspective on African development Challenges

In search of a development strategy for Africa

Programme of Action of ITUC–Africa.

Strategic Direction

Way forward

The main components of Project 4

The specific objectives of this workshop.

Overview of the presentation

This presentation gave a perspective of ITUC Africa on African development challenges and the role of the trade union movement in addressing these. The informalisation of the economy, corruption in governance, trade issues, HIV/Aids, globalisation, weak participation of trade unions in social dialogue; were some of the issues highlighted.

Cde. Kouglo mentioned that most of the activities of the 5 year strategic plan have been approved and implemented, and this workshop was the first activity on Project 4.

Provision was made for interaction on the presentation, and some of the issues flagged were:

- testing capacity through actual research activities.
- Commitment of trade union leaders to research through dedication of funds for research activities.
- Linking the current research work to previous work done by ICFTU- Africa and Doawatu.

### **Address by ITUC Africa general Secretary Comrade Kwasi Adu Amankwah**

Comrade Secretary General attended the workshop and was given an opportunity to address participants.

In his address he stated that research is critical to the trade union movement because the production of ideas and alternative thinking can only come from research and information seeking.

“Research and researchers are the resources the trade unions rely on for optimal engagement in collective bargaining and social dialogue, through the information that they provide “.

He touched on the key themes issues that ITUC Africa was seized with such as Regional Economic integration and trade and the critical role that trade union researchers can play in some of these areas.

“For any society to survive it needs its intellectual and spiritual leaders; researchers can and should fulfil that role for the trade union movement in Africa.” According to the secretary general.

He concluded by urging participants to develop curiosity and the enthusiasm to ask questions and hard ones at that.

### **Presentation Trade Union Research in Africa: asset for action and promotion of development: Cde. T Kalusopa**

Presentation Outline:

The changing world Order,

Ramification or consequences?

What is the power play?

How we engage and navigate?

What type of trade union values and traditions guide this?

Why the need for labour research?

Current institutional (labour research support) mechanisms at the global level

Institutional (labour research support mechanisms) in Africa

Group Exercise:

### **Overview of the presentation**

The presentation highlighted that globalisation and the attendant consolidation global capital is being driven by the belief that the free markets must lead economic development and growth. The role of the state and trade unions in the conceptualization of the global economy is to marginalise the role of the state of trade unions, workers and broader society.

The state is gradually, no longer as an expression of the will of the people who are in the majority, but rather an institution that is captured by narrow, private interest of the market and its players, who are in the minority.

The trade union movement has certain values and traditions that should inform our desire to serve as a countervailing power against the dominance and influence of the market and capital in society. Some of these core values and traditions, namely:

Free and independent trade unions

Working class solidarity

Unity in action

Worker control,

Should inform and frame our work as researchers in the labour movement. The purpose of undertaking labour research is develop trade union researchers who are immersed in the culture of the trade unions through proper theoretical grounding in its history, struggles ideas, principles and values.

He summed up by sharing with participants the labour research institutional framework at the global level, comprising of among others ILO, GURN, ITUC and the GUF's. At the regional level he mentioned ITUC - Africa, ANSA, LRS, Larry and Lardil among others.

Comments and interactions were entertained and they touched on the Chinese Investments study conducted by ALRN and the contribution of previous and current trade union research in Africa toward trade union unity and cohesion.

### **Group exercise**

Participants were then given an exercise as a practical to address three questions on

1. The importance of trade union research at affiliate level.
2. Opportunities and threats
3. How to create research links and networks at local, regional and international level.

The participants reported on this exercise after lunch. It transpired that most affiliates do not consider trade union research as a critical priority except in some cases from Ghana, Zimbabwe, South Africa, and Namibia. However some other affiliates such as in Uganda had despite meagre resources conducted collaborative work with the ILO and other partners to conduct research.

### **Presentation: Reflections on research Methods and Procedures by Cde. Kalusopa.**

Outline:

Introduction

Definition of research methods

Ethical issues in doing research

Research paradigm: Quantitative and Qualitative research

Action Research

The Research Process

Overview of the presentation

The presentation reflected on why research is taken namely to uncover truth, reality and new knowledge about social and economic subjects, objects or phenomena. The Ethical issue sea important because they address the objective and motivation for undertaking research, whilst research paradigms address mainly the qualitative (data in words) or quantitative (data in numbers) approaches to conducting research.

Research design touched on the methods, instruments, population samples, collection and interpretation of data. Action research on the other hand is research that is primarily done in order to advocate for arrangements and action by policy makers, managers or governments. This is research that is mostly undertaken by unions, though trade unions do all undertake often primary research in order to obtain a true and deeper understanding of labour market dynamics and behavior.

Interactions on the presentation:

The presentation was well received by participants and interaction centred mainly around the place and of action, applied and primary research in the trade unions. Limitations imposed by the different types of research and the inherent pitfalls and dangers of an improperly designed and executed research plan.

Issues were also raised about how trade unions can engage in self- cultivation to become well recognized researchers by their peers.

End of Day One.

## **Day Two.**

The chairperson Cde. Selby Miming welcomed the delegates for day two. Cde Kouglo then introduced the guest facilitator Cde. Richard Hall from the Solidarity Centre office of East Africa. The general Secretary Cde. Amankwah was also in attendance for this session and mentioned that he was keen to participate during Cde. Hall presentation.

The chairperson invited Cde. Richard hall to do the presentation.

### **Presentation: Introduction to Strategic Corporate Research by Cde. Richard Hall.**

Outline:

Strategic Corporate research

Sources of Information

The corporate campaign

Key Questions

Presentation overview:

The purpose of strategic corporate research is to develop a critique of the company and to turn this into leverage for the union. Where is the dirt? Dig it up and use it. Who cares? Legislators and investors. Use strategic corporate research to develop a strategy and tactics for your campaign against the company

This type of research requires you to ask the right questions such as

What are the employer's strategic relationships and plans?

How is the company organized?

Who is in charge?

What does the company do?

Where do they do their business?

The answers to these questions can only be uncovered through dedicated and systematic research, which in turn can be used to design a campaign in order to influence and often lean on the company to concede to trade union rights and demands. Information on these questions can be obtained in company reports, stock markets, and industry bodies and also from workers.

Interactions

Strategic corporate research has been used to win crucial victories against big transnational firms in Canada, and some concession from notorious trade union bashers like Wal-Mart. This strategy is mostly effective in jurisdiction where disclosure and publicly listed companies are prevalent. It is often difficult for one man, privately run and in countries where there is no democratic governance. However through networking and information sharing some of these challenges can be overcome.

Recap of day two:

After the presentation the rapporteurs for day one Cdes. Moemedi Kepadisa and Cheneso Maphorisa did a recap of the previous days' activities. They highlighted the address by Cde. General Secretary and the two presentations by Cde. Kalusopa and one by Cde. Kouglo. The practical exercise and its learning points were also mentioned, reflecting the critical points that were touched upon by each of the rapporteurs for the two groups.

## **Presentation 2: Guiding the development of a research proposal**

Finding a research Problem

Background, Rationale Motivation for research

Formulating a research problem and questions

Delimiting your study

Literature review

Elements of the writing Process

Overview of the Presentation

This presentation was building on the previous presentation of Methods and procedures. It deals mostly with theories and techniques of research and the structure of a research proposal. Related issues such as Hypothesis and the role of literature reviews in research were given specific and due attention. Complexities of formulating key research questions and secondary questions that would keep the research on the rails were also highlighted. The group exercise was to reinforce the key learning points of this presentation.

Group Activity

The group activity was participants to conceive a trade union research problem based on a socio-economic issue and develop a template for a research proposal based on this. The groups were to continue with the work before lunch and present after.

Presentations

Group one presented on the psychological effects of civil service reform on workers. This presentation highlighted the structure of the research proposal with respect to Title, Introduction, Statement of the problem < hypothesis, objectives and methodology. The presentation carried all the important learning points.

Group II: This group presented on "A baseline study of the existence of, norms standards of the national health Insurance schemes in selected African Countries. It touched on Title, Introduction, statement of the problem, Research objective, Research design and Methodology. Participants also appreciated that the group demonstrated an understanding of the key learning points.

Presentation: Priorities in Trade union Research in Africa: Why should trade issues concern trade unions?

This was a presentation done to summarise and integrate comrades Cde. Kalusopa's presentations for the past two days.

This presentation covered the following areas

The workings of the world economy

How is world trade structured?

The World Trade Organisation

Impact of trade and trade related issues on workers

Impact of trade and trade related (FDI) on workers.

Alternatives to neoliberals in Southern Africa as a strategy.

Overview

The presentation reflected on the reality that African economies are experiencing deteriorating terms of trade with the EU, China, USA and other advanced developing economies like India and Brazil. African economies are still trapped in primary resource production and do not reflect industrial dynamism since the early 70's. This is largely because of the unfair and skewed global trading system, the perpetuation of colonial dependency relations and also the democratic deficit in many African political systems.

The ANSA initiative has analysed this condition and has proposed some strategies to address most of the socio economic and political problems confronting the continent. ANSA promotes human centred and people driven development and contains about ten principles

End of Day two

## **Day Three, Wednesday.**

### Morning Session

The day started with a report on the previous day's activities during the morning session by Cde. Olivia Kunje. The report highlighted the presentations by Cde. Richard Hall on strategic corporate research and by Cde. Kalusopa on Research Methods and procedures, including the practical exercise that was done by the participants.

Cde. Boniface Phiri then continued from this point with the activity report for day two's afternoon session. This reported focused on the report back of the group exercise, and the presentations by Cde. Kalusopa on trade and the ANSA strategy.

A new chair for the day was appointed I the persons of Cde. Moemedi Kepadisa, who immediately proceeded to request Cde. Kouglo to give guidance on how the day's programme was to unfold. Cde. Kouglo then introduced Cde. Grayson Koyi as the facilitator for the remaining three days of the programme.

### **Presentation: Elementary statistics for trade unions**

#### Overview of presentation

This presentation introduced concepts such as the definition and concept of statistics, Role of statistics, distinctions between descriptive and inferential statistics. Issues of reliability and validity of data, and the limitations on drawing wrong conclusions and inferences based on false statistical indicators.

Other concepts introduced were the following:

Types of data, evaluating statistics, Primary versus secondary data

This presentation spend a considerable amount of time looking at measures of central tendency such as the Arithmetic mean and geometric mean, The mode, and the median and the role, uses and limitations of each of them in statistical analyses.

#### Practical exercise

The groups then performed a practical exercise on calculating the arithmetic mean and the geometric mean.

Feedback received after the exercise was that in certain instances if one takes a short term view the arithmetic mean could be advantageous but in most instances economic activities take a long-term approach and hence it is always advisable to use the geometric mean because it is more realistic and moderates the incidence of weightings in statistical data.

Afternoon session

### **Presentation Two: National Economy and the operators**

Overview:

An economy was described as an integrated system of production, distribution and of consumption of goods and services. It comprises millions of individual economic units broadly categorised into Households, firms and government. Together these units determine the economy's total spending, income and outputs. This presentation highlighted the circular flow of income in the economy across households, firms and government.

Other concepts that were teased out during this presentation were the Gross Domestic product (GDP) and its measurement. The Expenditure and Income approach to GDP measurement was also highlighted, as well as Real versus Nominal GDP.

Practical Exercise

Participants were then given a practical activity to answer the question: What influences the GDP? Is it power relations or productivity? Predictably, a passionate debate ensued among participants albeit in a collegial spirit, based on the contending intellectual approaches of modern economic thinking namely the neoclassical versus Keynesian approaches on economic management.

End of day 3

### **Day 4**

Thursday was an early morning start in order to cover some of the areas that needed more extensive coverage. The Chair for the day, Cde. Selby Miming called upon the rapporteurs for the previous day to present.

Cde. Paul Riekert gave input on the morning session, wherein he highlighted the presentation by the Facilitator on elementary statistics, and their role in enhancing trade union research and policy formulation. Concepts such as the basic statistical indicators, especially the geometric and arithmetic mean were given adequate focus.

Cde. Edwin Mwakyembe followed up with the report on activities of the afternoon session. His input captured the group report backs on the exercise of elementary statistics, as well as the presentation by the facilitator on the national economy.

Participants acknowledged that the resorts have captured the key learning areas of day 3. All rapporteurs were reminded by the chair to hand over their reports to Cde. Kouglo for further processing and record.

Group Activity

Participants again broke into two groups to complete the remaining questions for the previous day's practical exercise.

The group activity dealt with actions and strategies to be undertaken by unions in improving economic governance. The related question was to consider a policy brief to a Union in preparation for a meeting with IMF/World Bank? World Bank delegations about the state of the national economy.

The exercise was to reflect on the research aspects indicators and justification for the proposals contained in the policy brief, from a labour perspective.

The report back by the groups covered a range of issues under actions and strategies. Reflecting on the internal trade union actions and strategies as well as external ones.

Some of the actions and strategies proposed were:

\_ strengthening trade union organisation and building unity,

Capacity building and research

Consolidating internal trade union democracy and structures.

- improving economic and political governance

- combating corruption

- Skills development and human resource development.

The policy brief for an IMF/World bank meeting could contain such issues as

\_ Mainstreaming unemployment and social issues in macroeconomic analysis.

- teasing out some of the less researched and analysed issues in economic planning such as living condition, minimum wage policies, debt levels and domestic capital formation and investment.

Comments and questions

Specific trade union actions are crucial even as the union advises for broad general policy issues at a macro level. Issues of building organisation which gives the union power and invoice must always be given priority and continual focus. The groups were also advised to expand on specific labour market research issues: these were explained as collective bargaining settlement rates and Minimum wage determinations that do not contribute to decent work and life.

A comparative study on Minimum wage policies was identified by the group as a potential area for research that can be undertaken as future work.

**Presentation: National strategies for the effective participation of trade unions in the examination of the national budget, the review of public expenditure and the formulation of proposals by Grayson Koyi.**

## Overview of the Presentation

The budget is an expression of national expenditure and income. The national budget is primarily a planning tool. The national budget usually attains the following structure:

- Review of international economic developments
- Review of the domestic economic development broken down into:
  - Macroeconomic performance
  - Sectoral performance
  - External sectoral performance
- Budget performance for the previous year
- Objectives and policies for the previous years
- Fiscal framework (estimates of revenue and expenditure)

The presentation also focused on the Medium Term expenditure Framework as a tool which IMF? World Bank uses to influence, assess and guide the policies of particularly developing countries. Some interventions that the trade unions can make are to demand sight of the Government IMF/World Bank annual Letters of Intent (LOI's) and Memoranda of Understanding (MOU) on economic and social policies, targets and performance indicators. Such intervention will ensure that governments do not commit to anti-poor and anti-worker policies in their deliberations with these institutions.

The presentation also highlighted the different phases of the budget process or cycle and what trade unions can leverage at each phase to advance their own macroeconomic demands.

Trade unions should engage much more with the budget process within their national economies through conducting budget literacy and producing budget guide booklets; assessing budget processes to ensure transparency and consultation; analyses of budget outcomes and implications on employment, taxes, social protection, food, administration and infrastructural priorities.

## Group Work

Participants were tasked to consider two questions mainly focusing on what trade unions can do to track performance of the national budget. The second question was looking at ways and means of ensuring that trade unions submissions are considered in the national budget policy decision.

The groups were to report on this exercise for the following day.

End of day 4

## Day Five, Friday 16<sup>th</sup> April 2010

### Morning Session

This being the last day of an intensive five day training programme, participants agreed on a earlier start so as to affords facilitators enough time to cover the entirety of the programme and to complete the agenda for the day. Provision was made for evaluation of the workshop and the closing and final arrangements for the travel and departure of participants.

The chair opened the meeting and a recap of day 4's activities was done by Cdes. .... for the morning session, and comrade Yazidi Baligisani for the afternoon session.

### Recap of day Four

Both reports reflected on the presentation that was done by Cde. Koyi on trade union participation on the national budget, public expenditure review, the budget formulation process and cycle. .The rapporteurs highlighted the group report back session in the morning and the practical exercise that the groups conducted on There was not much to report for the afternoon session of day four, as the session was reserved for individual work and cultural visit in Nairobi.

### Group report backs

Cdes. Moemedi Kepadisa and Cde... reported on behalf of the two groups on the day fours group work exercise focusing on effective participation and proposals in the national budget formulation process, and how to track budget expenditure.

The following issues were highlighted by the two groups:

\_ The need to develop a data base on the national budget so as to be able to perform comparative analysis.

- Continuous monitoring and research

- tracking department or line ministry performance reports for evaluation of implementation.

Some of the best practices that were highlighted by the group were the IDASA Budget Monitoring Programme and the people's budget process in South Africa. The EU, Nordic countries and Indian systems of consultation could be adapted and improved upon by African countries.

The issue of trade union unity and common messages in countries where you have a multiplicity of centres was emphasised. The case of south Africa whereby during the 2010 budget trade unions adopted different and seemingly opposing positions on some budget proposals like the wage subsidy

issue, was cited as an example that weakens our policy engagement, which can be exploited by other social partners to dismiss labour's proposals.

**Presentation: Socio- economic governance and social justice in Africa: trade union action for the promotion of development and social justice. By Grayson Koyi.**

This presentation covered three modules on the Poverty reduction strategy papers, national development strategies or frameworks; and a case study of Zambia's experiences with national development planning cycles as a highly indebted and poor country (HIPC).

Overview of presentation

The presentation delved on the historical and conceptual origins of the PRSP process within the ranks of the Bretton Woods Institutions (BWI's). PRSP's were a progression from the Economic Structural Adjustment programmes imposed promoted by the IMF/world bank on developed countries throughout the world in the aftermath of the balance of payments crises caused among others by the 1974 oil shock.

After the consisted criticism by economic and political analysts on the inappropriateness of ESAP's on development, and an admission on some of the policy failures by the world, recipient countries were then tasked with developing self discovered proposals on economic and social policies and objective.

The evidence of success or failure of the PRSP's is uneven and varied from those countries that have implemented them like Uganda, Zambia, Bolivia and Tanzania. Many of the HIPC countries in Africa had to participate in the process in order to qualify for aid and loans from governments and multilateral agencies.

Opportunities presented by the PRSP's Process to labour and civil society.

The PRSP's process has been able to carve some spaces for trade unions and civil society to make inputs in national economic development processes and plans. Combating poverty has now been mainstreamed not only at the global multilateral level, but also integrated as a key objective in national policy programmes.

Challenges thrown up by the PRSP process

Donor alignment

Elusiveness of Country ownership

Lack of synchronisation between national and lower spheres of government.

Disarticulation across ministries

Unclear roles and responsibilities for stakeholders.

**Presentation: Case study of Zambia by Grayson Koyi**

An illustrative presentation was made on The Zambian PRSP/ National Development Plan Process. The presentation shared insights with participants on:

- How the plans is developed.
- Which line ministries were responsible?
- The role of civil society in planning and execution
- The programmes and objectives of the plan
- Macroeconomic Policies, Social Policies, Rural Sector policies and Agricultural policies

A poignant matter shared with participants here was that the Zambian government was reluctant to include employment and labour policies as a key focal objective of the national plan, after this was proposed by the labour movement.

It was only after constant pressure by labour and with international support from the ILO and ITUC that the Zambian government conceded that Decent Work should be included as a key developmental objective. Labour and employment policies were included thus included after lobbying and networking by the labour movement.

**Group Work**

Participants were tasked to consider ways of improving participation in PRSP's/ NDP as well as in the monitoring and evaluation of the national development plans.

**Report Back**

The report backs from the two groups focused on

- \_ improving the quality of participation by leadership as these are high level and strategic engagements
- Social pacts between governments, labour and business
- Leverage and locating the role of direct action to foster policy change and review
- developing capacity of performance monitoring and evaluations systems and techniques.

**Afternoon Session**

The session after lunch focused mainly on the Evaluation and the Way forward.

### **Presentation by Cde. Prof. Kouglo on the Way Forward.**

The presentation mainly shared with participants the plans initiatives of ITUC –Africa in taking forward and strengthening the capacity of research and that of labour researchers.

The presentation elicited on the following issues:

- Research activities planned by the regional body.
- How to promote research in national centres.
- establishing research teams or groups at the regional and national level.
- Training on research, identification of projects and execution research activities.

### **Evaluation and appreciation**

Participants were handed evaluation forms to give feedback on the programme, content and logistics.

Space was provided for comments on the programme, content and logistics. Most delegates expressed deep felt appreciation for the professional and productive manner in which the programme unfolded during the five days. Improvements were suggested in communicating the topics in advance so that participants come well prepared.

Generally positive comments were received. According to participants the workshop was open, interactive and conducted in a comradely spirit. There often divergent and contending perspectives but these were addressed in collegial manner, which was commendable. The skills attained and knowledge formed was valuable.

### **Closing Remarks by Cdes. Kouglo and Sylvan Kiza.**

They have borne witness to the enthusiasm and cooperation among participants. Most national centres that were invited attended but for Gambia who cancelled at the last minute. The projects are now in the implementation phase but their success will depend on the participation and contribution of affiliates. The current ITUC Africa general Secretary and the administration are passionate about research and evidence based policy engagement by the trade unions, hence the mainstreaming of research in the current project cycle.

They wished all the participants well and a safe return to their homes and national centres.