

RESEARCH FROM INSIDE MASS ORGANISATION: COSATU/NUMSA

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The rapidly expanding role of research within the trade union movement is one important index of the changing role of trade unions in the society as a whole. The trade unions have traditionally made demands and have left to others questions relating to how those demands shall be designed, financed, delivered and controlled. The nature of the demands under this model were relatively simple and related primarily to recognition of the trade union, wages and working conditions. Today the demands are much more complex and the trade unions are no longer abrogating the delivery questions to others.

This change has come about because of the failure of the traditional mechanisms, namely the apartheid state and employer bodies, to deliver the goods. Instead growing unemployment and increasing poverty have characterised South Africa for the majority. It is true that the emergence of a new democratic state is an essential part of new solutions - hence the formal alliance between COSATU and the ANC/SACP. But the trade union movement has publicly stated that it believes that it has an independent role in the future political economy of South Africa.

This change has introduced strains within trade union structures which have to now take on these new challenges in addition to the traditional functions - without having additional human or financial resources. Such internal challenges have had to be met with innovation - the nature of which is the content of this talk.

The first steps in this direction were taken by COSATU in response to the accusations from Inkatha and other conservative groups that our support for sanctions was leading directly to job loss. COSATU commissioned a service organisation to investigate this allegation. Their finding, in brief, was that the South African economy was in such deep structural crisis that it was impossible to isolate a single short-term cause.

This led to COSATU facilitating the establishment of the Economic Trends group of economists - which has been exploring alternative growth path strategies. Whilst the findings of this research were extensively discussed at national leadership level, a problem emerged with the facilitation of debate at regional, local and plant level. The link between research on the one hand and accessibility, consultation, democratic decision making and popularisation on the other hand emerged as a central issue. An associated problem was that of 'experts telling workers what to think' - to which workers reacted either with alienation or anger. The process was disempowering and counter to a union tradition and commitment to democratic decision making based on extensive debate. The processes surrounding research - including the questions of the research focus and who the researchers themselves should be - moved to centre stage.

The areas associated with this debate are:

- Who sets the research agenda? Here there is perceived to be a dialectic between problems emerging from experience, e.g. retrenchments, low wages, illiteracy, etc. and those generated by the research process at macro level, e.g. growth rates, balance of payments etc.
- Who does the research? Here questions of affirmative action have been raised.
- Can the process include a focus on:
 - a. Improving the union movement's human capacity to contribute to and absorb research findings?
 - b. Active and ongoing involvement of the union structures? Building on the 'Gold in Workers' Heads'.
- Can the product itself be broken into meaningful stages - so that comment and discussion can inform subsequent stages - both of decision making and further research?
- How can leadership best take informed decisions at congress and executive level?
- How can popularisation and education on policy to membership best be facilitated once decisions are taken?
- How best can the link between researchers and people with specialist knowledge and the negotiating teams be structured? This is a dialectic - as information gained through negotiation is often of critical importance to the research process.
- How can a body of union people develop the skills for public speaking to outside audiences, e.g. employer groups, academics, etc. to explain the policies at differing levels of complexity.

It is important to note that the independence of the researchers is not an issue. It is accepted that researchers, once working, are absolutely independent in the sense that they are free to produce any product. The organisation of course is not committed to accepting the product - this is up to decision making processes.

The envisaged process is akin to that being employed by Japanese innovators - where innovation is driven as much from suggestions from the workforce as from specialist research centres. The division between workers and experts is being blurred.

This may sound theoretically good, but how does it pan out in practice? I will now outline three different ways in which the above research related questions have been addressed within the union movement. But the debate itself will no doubt continue for a long time.

The First Example is the NUMSA Vocational Training Project

In 1989 NUMSA established a number of Research and Development Groups, consisting of elected worker representatives and co-ordinated by union officials. Each group was charged with the duty of developing proposals in a particular problem area. The areas at that time arose out of collective bargaining issues - pension/provident funds, housing schemes, vocational training and literacy and the

broader political economy group.

The Training Group, as it became known, met three or four times and realized that the task of conceptualising proposals was more complex and required more time than was available within the odd one-day meeting every three months - especially given our total lack of experience in handling these issues. So the Training Project was conceived.

A wider group of 24 workers and 2 officials was elected - representing the union across its regions and sectors. The worker delegates spread from operators to artisans and technicians. One seconded researcher from a service organisation was fully involved in the project from the start.

The Project was conducted in 1990. It was divided into three phases: Phase I was a three week residential phase during which extensive research was done into present training provision in the industries covered by NUMSA. This included presentations by employers and experts from a wide range of fields, visits to company centres and discussions around the experiences of the group members and their constituents. In relation to two specific areas, specific research was initiated - the present provision of literacy in South Africa and legal mechanisms to address race and gender discrimination.

Phase II was a series of overseas study visits. Group members visited a range of countries with training expertise and the ILO facilitated a special seminar on International Standards and the ILO capacity for those group members who went to Zimbabwe. During this period the commissioned research was conducted.

Phase III was a second 3 week residential period where all the above threads were woven together and a set of recommendations prepared for the union.

Although the Project was officially complete after Phase III, in fact the group continued to meet at approximately three monthly intervals. The group members presented the recommendations of the Project back to their regions for debate. The bulk of the proposals were subsequently accepted by the decision making structures of the union. However some were referred back for further discussion. The group members then presented the training proposals as policy to employers and a phase of negotiation around the proposals began.

In 1991 the proposals were presented to employers in national bargaining forums and major breakthroughs were won in the engineering, tyre and auto industries. Ongoing development work is being done by the same group - in association with international trade union allies. The proposals were also referred to COSATU Congress in July and, with some additions, were endorsed there.

At the first meeting of the COSATU Executive in January this year, they adopted a proposal to conduct a Participatory Research Project along the lines of the NUMSA Training Project - with the participation of all affiliates. The motivation was made that such an approach simultaneously addresses policy development, capacity building and education.

The Second Example is the COSATU Industry Restructuring Project

As retrenchments mounted in 1990, the demand for employment security and

growth became central. Traditionally defensive battles seemed to do little more than marginally reduce the numbers to be retrenched and give those affected a bit more money in their pockets. But the structural problem of an economy in crisis continued to grow.

The Economic Trends group - consisting of expert economists - had done its central task. The 'Growth Through Redistribution' economic strategy was greatly informed by their labour. However, the propositions were fairly general.

After extensive consultations between ET (as it was called) and COSATU, it was agreed that more detailed work in the area of sector studies was needed. In the end a number of expert researchers were employed full time for 15 months to work on the Industry Restructuring Project. The Project has just begun, and is not complete. The Project has the following features:

- In consultation with COSATU, key sectors for growth were identified. Researchers were then employed to do specific sectors.
- The Project was formally agreed to by COSATU.
- Each researcher is to build links with the relevant trade union and budgets are drawn to facilitate discussion with stewards and members.
- Trade union nominated research trainees have been seconded to the Project to develop their research skills further. It is the intention of the Project that they should return to their unions after the Project.

The success of this model has yet to be tested - but it does have the active support of the trade unions.

The Third Example is Commissioned Research

This traditional model does not need much explanation. However there are certain specific features of the model as applied in the trade unions.

- The research areas are generated by groups of affiliate representatives through discussion and initial exploration. (If it requires a substantial budget it is referred to senior committees for decisions).
- Criteria for commissioning research have been debated within the federation. These include questions of affirmative action in favour of black and female researchers.
- Research findings often have to be presented in various phases to the commissioning group for comment and discussion. This results in a dialectic between process and product. There is no question that the researchers make a major contribution to the development of proposals. However, it is also true that comments from the group play an important role in ensuring that the work is addressing the problems of the federation.

The third model is the most flexible of all, but is also somewhat limited in relation to wider objectives of the research process in the trade union movement - namely capacity building and education. These have to be addressed after the research is complete. At worst it consists of a burnt out organiser phoning a service organisation with a request to tell him or her about 'x' before yesterday when an urgent negotiation is to take place. But at best it allows for a fruitful combination of resources.

These three models could be characterised as a spectrum from fairly independent trade union research, through fairly equal co-operation between a trade union federation and a research body, to a fairly dependent relationship of the trade union on outside researchers. Of course there is also the kind of research which is completely independent of the trade union movement which ultimately impacts directly or indirectly on the trade union's work. This is extremely important as often trade unions are bound by their negotiating agendas - however broad - and are unable to react at all to a range of important developments in society. Independent research - which is critical of trade union policies for example - can be important in the evolution of policy. Research around alternative technologies can become relevant within negotiations without ever having been commissioned. The list of examples here could be very long indeed.

Another model is continually being proposed by employer groups - namely jointly conducted and/or commissioned research by the trade union and themselves. The trade unions have resisted this model in the belief that the parties to a negotiation need to enter the process independently. However the demand for information from employers to enable the unions to conduct their own research is very common. But the inequality of resources in relation to research is increasingly a problem especially when the negotiations are highly complex.

This raises an important point. Internationally, those trade union movements who have taken up the 'new negotiating agenda' of economic restructuring and active labour market policies - and there are many examples such as Sweden, Canada, Italy, Australia, Germany - have tended to increase massively their own internal research capacity and strengthen their relationship to outside research institutions. This has generally been accompanied by the development of really substantial library and information facilities. And Quality of research has increased with Quantity.

This trend is already apparent in South Africa. No longer will union researchers have job descriptions that include a wide range of office administration and collecting delegates from airports! Nor will their offices be in the basement with the rats. And information officers too will enjoy the status of promotions (whether their pay follows the same trajectory is a moot question).

In conclusion, I hope I have comforted you with the sense that if you as researchers are having headaches trying to adjust to changes in this South Africa of ours - in their honest moments trade unionists will admit to having growing pains too.