



## **STRATEGIC PLAN 2018 - 2023**

**Prepared by ZILARD Secretariat**

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## **FOREWORD**

The inspiration for establishment of ZILARD has been well documented and infers to the acknowledgement of identified gaps in terms of effective policy intervention by the trade union movement in Zambia. It has thus been well noted that the labour market in Zambia remains hugely under-researched and the trade union agenda is mostly shaped by impulsive reactions to policy changes on the labour market rather than proactive and evidence based interventions. Therefore, the need for a research institute cannot be overemphasised considering the available space for the institute to generate information and provide timely policy guidance to the ZCTU and indeed the labour movement in Zambia. However, for ZILARD to be effective there is need for strategic direction articulated through a strategic plan.

This Strategic Plan (2018-2023) is a response to this noble call to entrench ZILARD. The Strategic Plan arises out of ZILARD's systematic engagement among its affiliates within the context of the current rapid changing circumstances within Zambia, SADC region, Continent, and the global world. It is a product of detailed research work and consultations and therefore represents the consolidated working framework for trade unions in Zambia. The Strategic Plan reviews the challenges of the national development plan and places ZILARD in context. It articulates how the leadership in the ZCTU mainstream organizational structure and its affiliates can cultivate the commitment to the one vision so as to build the capacity to initiate and manage labour for effective trade union dynamism. It strengthens the view that, in order for ZILARD to survive, union leadership needs to win commitment from its members from within and outside its ranks through solidarity and collective effort. This Strategic Plan therefore, presents a road map of how ZILARD can consolidate these structures and build a progressive labour movement in Zambia.

I am very confident that the trade union movement in the Zambia will embrace this Strategic Plan and translate it into some workable agenda for the workers. I believe also that this document will assist the labour movement to reconnect and redefine the workers' fight and their songs of despair. I also believe that the document will instill a sense of hope for dignity, self-pride and liberation among the workers in the UNEAC region.

**Mr. Cosmas Mukuka**

**ZCTU SECRETARY GENERAL/ACTING BOARD CHAIRPERSON, ZILARD**

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## **LIST OF ABBREVIATIONS AND ACRONYMNS**

ALREI	African Labour Research and Education Institute
COMESA	Common Market for Eastern and Southern Africa
CSO	Central Statistics Office
DWA	Decent Work Agenda
EU	European Union
FES	Friedrich-Ebert-Stiftung
FNV	The Netherlands Trade Union Confederation
ILO	International Labour Organisation
ITUC	International Trade Union Confederation
SADC	Southern African Development Community
SATUCC	Southern African Trade Union Coordinating Council
UNEAC	United Nations Economic Commission for Africa
ZCTU	Zambia Congress of Trade Union Congress
ZILARD	Zambia Institute for Labour Research & Development

## **1. INTRODUCTION**

- 1.1 This is a working draft Strategic Plan from 2018 to 2023 for the Zambia Institute for Labour Research and Development (ZILARD). It documents the intentions of the Institute to use evidence-based research to respond to dynamics in the socio-economic, political and legal framework shaping the labour movement in Zambia within the regional, continental and global engagements.
- 1.2 It is based on the critical review of the Zambia Socio-Economic Development Planning Policy processes, Zambia Congress of Trade Union (ZCTU) Strategic Policy Direction, current International Labour Tripartite Policy Frameworks and Broader-based Consensus and consultations within the ZCTU affiliates, Ministry of Labour and Social Security and other co-operating organisations or agencies. The culminating strategic direction reflects a blend of documentary review and research as well as interviews with key ZILARD Board members, ZCTU Board and Executive Board Members, all the ZCTU affiliates and other key stakeholders in Zambia.
- 1.3 The document is divided into eleven key sections namely: (a) introduction; (b) socio-economic trends in Zambia; (c) contextual analysis of ZILARD strategic plan; (d) assessment of opportunities, threats and mitigating factors for the existence of ZILARD; (e) stakeholder analysis and ZILARD collaboration; (f) strategic vision, mission and core values of ZILARD; (g) ZILARD strategic areas of focus or priorities; (h) implementation strategy that sets the strategic targets for the period 2018-2023 and indicates how the strategic targets will be achieved including a matrix reference frame. (h) It also puts forward the critical factors for the success; (i) the role of the key ZILARD institutional organs and allied strategic partners; and, (j) sustainability of the strategic plan.

## **2. SOCIO-ECONOMIC TRENDS AND CONTEXT IN ZAMBIA**

- 2.1 In 2017, Zambia's economic growth recovered to an estimated 3.9% (from 3.8% in 2016) on the back of a bumper crop harvest and better electricity supply. Faster economic recovery was dragged by large government payment arrears, which exerted pressure on the financial sector. Non-performing loans rose to 12.3% of outstanding loans, and lending to the private sector declined, thus constraining private investment and consumption (CSO, 2018).
- 2.2 Growth is projected to strengthen to above 4% in 2018 and over the medium-term. The clearance of arrears and the pursuit of accommodative monetary conditions should bolster the recovery of the financial sector and unlock consumption and investment lending. High international copper prices and improved domestic production from newer and recently refurbished mines is expected to support exports. High copper prices have eased external pressures, leading to a stable *kwacha*, which, together with a bumper harvest, helped contain inflation within the medium-term target of 6-8%. These improvements prompted the central bank to ease monetary policy at all the past six monetary policy committee meetings, for a total

policy rate cut of 575 basis points. However, the fiscal-debt remains fragile, as it remains higher than necessary to calm debt growth, despite being below its 2017 budget target. External debt rose to US\$8.7 at end-March 2018 from US\$7.9 at end-2017, and total public and publicly guaranteed debt is now estimated to be close to 61% of gross domestic product (GDP). In October 2017, a joint IMF-World Bank Debt Sustainability Analysis elevated the risk of external debt distress to high from medium (Ministry of Finance, 2018).

- 2.3 According to the 2010 Census of Population and Housing, life expectancy at birth was 51.2 years. Females had a higher life expectancy at birth of 53.4 years compared to 49.2 years for males. The previous strategic plans for the country had poverty reduction as an objective in the medium to long-term. In spite of impressive economic growth rates registered during the period 2006-2015, overall poverty levels remained high. The percentage of the population living below the poverty line declined from 68 percent in 2006 to 54 percent in 2015. In rural areas, the percentage of the population living in poverty marginally reduced from 80.3 percent in 2006 to 76.6 percent in 2015, while in urban areas the percentage living in poverty declined from 53 percent in 2006 to 23.4 percent in 2015. Despite the recorded decline in percentage of population living below the poverty line, income inequality as measured by the Gini coefficient, increased from 0.60 in 2006 to 0.69 in 2015. In urban areas, the Gini coefficient reduced from 0.66 in 2006 to 0.61 in 2015, while in rural areas the Gini coefficient increased from 0.54 in 2006 to 0.60 in 2015 respectively (CSO, 2010).
- 2.4 Zambia is endowed with massive natural resources with an estimated 14 million people of whom 51% are women and 49% men. Zambia has many inequality and poverty challenges, but also a massive potential for economic growth with its rich natural resources such as copper and cobalt. The failure of the strong macroeconomic position to translate into reduction in poverty, inequalities and improve general living conditions for the majority of the Zambians is associated with the poor governance model where despite major investments in developments, job creation has not grown in tandem with gains in economic growth. The benefits of Gross Domestic Product (GDP) growth have accrued mainly to the richer segments of the population in urban areas, and hence Zambia has a very unequal distribution of income. (World Bank, 2016)
- 2.5 The recent Zambia Demographic and Health Survey (2013-2014 ZDHS) show that poverty continues to be a rural phenomenon estimated at 73%, three times that of urban areas. This alarming poverty and inequality statistics stand in sharp contrast to Zambia's strong economic growth record over the past decade. Women continue to play a critical role in sustaining the productive sectors such as agriculture, commerce and trade but have unequal access to and control of resources, especially productive resources such as land and financial capital. This is despite the fact that they sustain the agricultural sector through provision of over 60 percent of the labour force. (2013-2014 ZDHS)

- 2.6 Zambia's demographic profile for 2018 shows that the population is estimated at 16 million with the population growth rate is at 2.93% (2017 est.), and is the eleventh highest in the world. In terms of age structure, 46.03% (of which 3,693,255 are males and are females 3,657,890) and are in the age range of 0-14 years; 20% (of which 1,595,628 are males and 1,598,065 are females) are in the range of 15-24 years; 28.72% (of which 2,310,961 are males and 2,276,018 are females) are in the age range of 24-54 years; 2.93% (of which 217,954 are males and 250,134 are females) are in the age range of 54-64 years, and lastly 65 years and above constitute 2.33% (of which 162,605 are males and 209,490 are females) (2017 est.). This demographic information show that Zambia has a young population. Hence, given the high unemployment rates, it is the youth that are the most affected. Furthermore, lack of access to family planning services, education for girls, and employment among women are some of the contributing factors to high fertility levels plus poverty (CSO, 2108).
- 2.7 According to the 2014 Labour Force Survey, more than 80 percent of the employed in Zambia were in the informal sector (91.2 percent for females, 75.8 percent for males). However, the sector was characterised by low levels of productivity, capital investments and technology, thereby offering limited prospects to contribute to national development and ultimately improving the standard of living of the majority of the people. Overall, the unemployment rate was 7.4 percent of the total labour force. Urban unemployment rate was 11.5 percent while rural unemployment rate was 4.2 percent. During the period under review, youth unemployment remained one of the biggest challenges. Of the 3,812,923 youths in the labour force, 400,810 were unemployed, representing a youth unemployment rate of 10.5 percent. The male youth unemployment rate was higher at 12.2 percent than the female youth unemployment rate at 9.1 percent. The rural youth unemployment rate was 6.4 percent, compared to 15.2 urban youth unemployment rate. The majority of the people working in the informal sector were classified as working poor with low levels of income, limited or no access to social security and other core labour standards as prescribed by the International Labour Organisation (ILO). In addition, a significant number of the working population was self-employed, mainly in subsistence agriculture or small-scale and often fragile businesses (CSO, 2108).
- 2.8 Employment (Special Provisions) Act Cap 270 is an enabling Act and may be activated only when a state of emergency is in place. Under this Act various regulations may be promulgated with regard to labour and employment. There are normally two categories of employees namely the unionised and non-unionised (management) staff. Conditions of service for non-unionised employees are normally fixed by top management, while those for unionised employees are negotiated through collective bargain/agreement. The Minimum Wage and Conditions of Work Act provides for mechanism for determining statutory minimum wages and other conditions of employment in industries or companies where conditions of employment are not regulated by a free collective bargaining system. Allowances, which are commonly added to the basic salary, include: Housing; Transport; Children's medical and education; and Water, electricity, holiday travel (usually for senior management staff). All allowances are taxable at the same rate as

the basic salary. Other common non-cash benefits may include: transport to and from work, subsidized meals in staff canteen and sporting and recreation facilities (Ministry of Labour & Social Security, 2017).

Membership of a pension scheme may be a condition of employment and most employers maintain a pension scheme for their employees with the National Pensions Scheme Authority (NAPSA). Employers may establish or join other pension schemes under the Pension Scheme Regulation Act, Insurance companies that offer pension schemes and there are several of them. The normal working hours is 40 hours per week for office workers and 45 hours per week for factory workers. Office hours are normally from 08:00 hours to 17:00 hours Mondays through Fridays and 08:00 hours to 13:00 hours on Saturdays (for most companies outside the retail sector). The normal weekly hours should not exceed 48 hours under the Minimum Wages and Conditions of Work Act (Ministry of Labour & Social Security, 2017).

Most contracts of employment may be terminated under the Zambian Law through: Resignation or Dismissal; Normal Retirement or Medical Discharge; Expiry of Contract; Redundancy Frustration and/or death. An employer is obliged, under Section 26A of Statutory Instrument No. 15 of 1997, to afford an employee the opportunity to be heard prior to termination of the contract of employment, if the termination is on grounds related to the employee's conduct or performance. This obligation on the part of the employer is in conformity with the International Labour Organisation Convention. The Zambian law, further, provides for the minimum benefits payable to the affected employee, and requires payment of full wages for an employee declared redundant until the redundancy benefits are paid (Ministry of Labour & Social Security, 2017).

### **3. CONTEXTUAL ANALYSIS OF ZILARD STRATEGIC PLAN**

- 3.1 The ZCTU has now established a labour research institute called the Zambia ZILARD. It was officially launched in Lusaka on 25 April, 2018. Largely, the idea to establish a labour research institute was motivated by the commendable work being done by already established institutes elsewhere in the SADC region and beyond.
- 3.2 More importantly, the inspiration was affirmed by the acknowledgement of identified gaps in terms of effective policy intervention by the trade union movement in Zambia. Over the years, it has been evidently observed that the labour market in Zambia remains hugely under-researched and the trade union agenda is mostly shaped by impulsive reactions to policy changes on the labour market rather than proactive and evidence based research interventions (ZCTU Benchmarking Report, 2017). In that regard, the need for a research institute cannot be overemphasised considering the available space for the institute to generate information and provide timely policy guidance to the ZCTU and the labour movement in Zambia (ZCTU Benchmarking Report, 2017).

- 3.3 The above confirmation was preceded and guided by a thorough feasibility study that examined and assessed the research and education needs as well as policy space of the trade union movement in Zambia. The results of the feasibility assessment were approved by the ZCTU Executive Board anchored on previous recommendations of the ZCTU General Council. The conclusions from the feasibility study and earlier policy pronouncements concluded that trade unions across Zambia (ZCTU Benchmarking Report, 2017):
- Face a wide range of multifaceted research and training needs for which they lack appropriate capacity to address;
  - Lack capacity to use research outcomes for appropriate policy interventions, influence and impact;
  - Have low capacity to develop, conduct evidence-based research;
  - Confirm a weak labour research profile with regional, continental and global links; and
  - Lack a well-coordinated labour research country-wide.
- 3.4 Accordingly, it was resolved that an autonomous institute be established as a private company (limited by guarantee) to reinforce research and education capacity in the ZCTU affiliates and the labour movement. ZILARD is therefore an autonomous research, education and policy analysis institute that aims to assist in building trade unions labour research, education and policy analysis capacities for better capturing and influencing national, regional and international policy-space and development.
- 3.5 Arising out of the above, it was found prudent that in order for ZILARD to enhance, and effectively execute its mandate, there is a need to develop a strategic plan and operational working framework that will act as the blueprint and guide for ZILARD's work. This strategic plan refines and addresses thematic areas anchored on the current national labour challenges alluded to in Zambia's seventh development plane, the ZCTU strategic plan, decent work programme and the future of work agenda.
- 3.6 This strategic plan was also validated by key constituents namely the ZCTU Board, ZILARD Board and ZCTU affiliates in order to sustain coalition building and legitimacy. The outset for the ZILARD work therefore underscores the need for partnership with the other strategic partner such as the International Labour Organisation (ILO) in frontloading and mainstreaming the Decent Work Agenda (DWA) in the labour research processes so that the relevancy of evidence based research to the ZCTU and the labour movement in Zambia is sustained.
- 3.7 It also envisaged that the ZILARD strategic research agenda in the context of the ZCTU strategic plan will be firmly aligned to key pillars of the Decent Work Agenda and the relevant labour market issues highlighted in the country's seventh National Development Plan.
- 3.8 The ultimate outcome is that the ZILARD strategic plan and operational work plan will act as catalyst for the trade union movement in Zambia to become a change agent that will, among other strategic objectives, be able to promote the DWA for

workers' participation and capacity building for advocacy in the development of a just and democratic society in Zambia and beyond.

#### 4. ASSESSMENT OF OPPORTUNITIES, THREATS AND MITIGATING FACTORS FOR THE EXISTENCE OF ZILARDS

The establishment of ZILARD presents several strengths, weaknesses and opportunities for trade unions in Zambia. For clarity, Table 1, therefore, presents these on each of these components in the assessment of opportunities, threats and mitigating factors as deduced from benchmarking exercise.

**Table 2: Strength, weaknesses and opportunities for the research component**

Current state of labour research in Zambia	Strengths	Weaknesses & threats	Opportunities
There is no credible trade union research institute	Increased realization by more trade unions that research is important	Uncoordinated research outcomes at regional level	More and more organizations (national centres and unions) start to see the importance of research as the most solid basis for policy and strategy formulation.
National research information poorly coordinated	Existence of research departments in some national trade unions affiliate	Ignorance about the importance of research. Research is not a priority for trade unions affiliates in the ZCTU	The field of labour remains under-researched across the country, therefore, providing the potential for new information to be generated
Poor linkages with academic institutions	Existence of some fragmented labour research institutions in the country	There are very competent people around Africa in research (few in trade unions and many in academia)	Existence of national Trade Union Centers, employer organizations, government and civil society organizations that would benefit from research and education
Low interest by trade union leaders in research	There are very competent people around the country in research (few in trade unions and many in academia)	Neoliberal hegemonies whose influence undermines pro-labour development policies	Leadership willingness to develop some research capacity in some trade unions at national level
Research departments poorly capacitated	Existing & organized trade union membership which is becoming	Outcomes poorly shared with other actors	Recognition of the importance of research at regional level especially by regional

	conscious of the importance of research at the regional, national and continental level		and sub-regional trade union leadership
Most research initiatives are externally funded	Organized trade union membership at the regional and national level who are becoming conscious about the importance of research	Research outcomes not adequately used to influence campaigns	Creation of a pool of labour researchers
Capacity and output is on the decline	Existence of research departments in some affiliates	<ul style="list-style-type: none"> <li>• Low research capacity at national centre</li> <li>• Uneven research capacity at national level</li> <li>• Research outputs seen as ends in themselves</li> <li>• Work-overload for the few people with labour research expertise in the ZCTU</li> </ul>	<ul style="list-style-type: none"> <li>• Trade unions to engage other social partners in policy formulation as an opportunity for research</li> <li>• Capacity within some of the National centres (availability of research institutes in the region and continent)</li> <li>• Existence of potential partners who can help with logistical and technical support</li> <li>• There are policy gaps across country and Africa in terms of a pro-labour development agenda that will require to explore and advocate</li> <li>• Raising awareness about the importance of evidence-based demands</li> </ul>

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## **5. STAKEHOLDER ANALYSIS AND ZILARD COLLABORATION**

- 5.1 Over the years, the ZCTU has been implementing research activities based in line with the changing developments and emerging challenges. Before the establishment of ZILARD, ZCTU were able, with challenges, to carry out both short-term and long terms activities so as to meet its strategic objectives as envisaged, albeit with limited success. This limited success would never have been possible if it were not for several cooperating partners such as: ILO/ACTRAV, LO-FTF, LO-Norway, FES, Solidarity Center, Technical Institutions, Civil Society, in collaboration with the ZCTU.
- 5.2 In that regard, ZILARD has therefore to consolidate this strong network base with the like-minded institutions and organizations. During the coming period of the envisaged strategic plan, it is foreseen that there will also be more visible collaboration with the Africa Labour Research Network (ALRN), African Labour Research and Education Institute (ALREI) at ITUC-Africa and other labour research networks in the SADC. It is also important to note that the commitment from ZCTU affiliates is entrenched. Table 2 shows a summary of the stakeholder analysis in terms of category type, what they do; and areas of possible collaboration during the implementation of strategic plan.

**Table 2: Summary of Stakeholder Analysis and possible collaboration**

Stakeholder Category	What They Do	Possible areas of Collaboration
<b>TECHNICAL SUPPORT INSTITUTIONS</b>		
<ol style="list-style-type: none"> <li>1. ILO ACTRAV, Regional and Geneva Office)</li> <li>2. SATUCC and ALREI ITUC-Africa</li> <li>3. Labour Research Institutes and Academia</li> </ol>	<ol style="list-style-type: none"> <li>1. Technical support</li> <li>2. Research &amp; innovation</li> <li>3. Capacity development</li> <li>4. Policy Advocacy</li> </ol>	<ol style="list-style-type: none"> <li>1. Knowledge sharing/ learning</li> <li>2. Innovation</li> <li>3. Capacity development</li> </ol>
<b>GOVERNMENT/ AUTHORITIES</b>		
<ol style="list-style-type: none"> <li>1. National Government</li> <li>2. Ministries</li> <li>3. (Labour, Education, Finance, etc.)</li> <li>4. SADC and its Institutions (Summit, Council of Ministers,)</li> <li>5. AU, UNECA, NEPAD</li> </ol>	<ol style="list-style-type: none"> <li>1. Regulation &amp; oversight</li> <li>2. Public service delivery</li> <li>3. Project implementation</li> <li>4. Policy (re)formulation</li> </ol>	<ol style="list-style-type: none"> <li>1. Joint coordination and planning of programmes</li> <li>2. Capacity development</li> <li>3. Policy development</li> </ol>

<b>CO-OPERATING PARTNERS</b>		
1. ILO, LOFTF, SOLIDARITY CENTER, FNV, FES, LO-Norway 2. UN AGENCIES, AfDB 3. Other Trade Union Co-operating Partners	1. Offer project publicity 2. Technical and financial backstopping 3. Networking	1. Project implementation 2. Learning and knowledge sharing 3. Program development. 4. Joint fundraising
<b>SOLIDARITY ORGANISATIONS</b>		
1. Sub-Regional Organisations (SATUCC) 2. ITUC-Africa and OATUU 3. GUFs	1. Technical support 2. Capacity building	1. Joint coordination and planning of programmes 2. Shared learning 3. Financing 4. Networking 5. Joint project implementation
<b>CIVIL SOCIETY ORGANIZATIONS</b>		
1. Non-Governmental Organisations 2. CBOs/ community based institutions	1. Funding 2. Projects implementation 3. Capacity building	1. Joint coordination and planning of programmes 2. Shared learning 3. Networking 4. Joint project implementation

## 6. STRATEGIC VISION, MISSION AND CORE VALUES OF ZILARD

6.1 ZILARD is an autonomous research, education and policy analysis institute established by the Zambia Congress of Trade Unions (ZCTU) that aims to assist in building trade unions labour research, education and policy analysis capacities for better capturing and influencing national, regional and international policy-space and development.

### 6.2 Vision

The vision of ZILARD is to advance grounded evidence-based labour research, education and policy analysis that enhances a strong, dynamic and accountable trade union movement in Zambia to promote and defend socio-economic justice, fairness and equality in favour of workers.

### 6.3 Mission

A labour research think-tank that capacitates trade unions with labour research, education and policy analysis to enable them to effectively input into national, regional and global policy discussions and actions for the benefit of Zambian worker and the people.

### 6.4 Core Values of ZILARD

ZILARD stands for the redefinition of the working class ideological grinding that will use evidence-based labour research to create a critical trade union movement that understands their values and can engage in national and international solidarity. In doing so, a base should be constructed on which a parallel, joint programme of basic grassroots trade union activism can then be pursued based on trade union values of independence, worker control, bias to the poor and solidarity. In defining our stake in the national, regional, continental and global political economy, we seek to view the development process in a holistic manner where the following components are a driver to achieving worker liberation and social justice:

- The “*social factor*”, where workers and people’s basic human rights are safeguarded and how vulnerable people are protected against poverty and exploitation.
- The “*democratic factor*”, where the political system functions ethically and implements decisions and distributes resources and opportunities in a just and fair manner.
- The “*global factor*”, where systems at global level should respond to the needs of the workers and the people.

The core values of ZILARD are:

- Culture of Collective Struggle
- Workers' Participatory Democracy
- Accountability, Transparency & Ethics
- Class Consciousness & Struggle
- Social Dialogue & Constructive Engagement
- Cooperation & Networking with strategic allies
- Social Trade Unionism for Global Justice

## **6.5 Strategic Objectives**

The ZILARD strategic objectives are to:

- Initiate and drive a demand-driven labour research that is linked to education agenda that refines trade union consciousness and ideological grinding;
- Build the research capacity of trade unions to advocate for change through evidence-based policy positions in the interests of working people in Zambia and the world;
- Strengthen research as a tool for effective education and training capacity building of trade unions for better service delivery to their members;
- Assist in the development of empirically informed trade union policy interventions at the national, regional and continental levels.
- Maintaining an accurate and accessible database on the economy and labour relations in Zambia;
- Providing an online and offline platform for discussions on labour and national development issues.

## **7. ZILARD STRATEGIC AREAS OF FOCUS OR PRIORITIES**

- 7.1 The feasibility study that affirmed its establishment as a semi-autonomous Research and Education Centre of the ZCTU envisioned that ZILARD will thus place its expertise and knowledge base – acquired in particular in the context of its links with universities, academic and expert networks – in the service of workers' interests in Zambia towards the strengthening of the socio-economic dimensional capacity of the Zambian trade unions and assist in the movement towards African integrating the workers' agenda in the current and future policy processes for their benefit
- 7.2 ZILARD is therefore keen to ensure it meets its objectives as an organisation. The issues in the Strategic Plan (2018-22) are based on the broad objectives of ZILARD, ZCTU strategy, national development plan, global strategic labour consensus on decent work agenda and the future of work. ZILARD labour research work will largely revolve around the following the theme:
- Economic governance system and labour relations.
  - Worker participation and industrial relations.
  - Sustainable development and industrial policy.
  - Transitioning of informal to Informal economy and Social Protection.

- Future of work, working conditions and job quality.
- Trade union renewal, organisation and recruitment.

7.3 The ZILARD organizational strategic programming and operational strategies will revolve around the following focus four operational legs:

- Labour research and socio-economic policy analysis
- Labour education, training and capacity building
- Labour information, communication , advocacy and campaigns
- International labour research collaboration

### 7.3.1 Strategic Focus 1: Labour research and socio-economic policy analysis:

#### (a) Rationale

The labour research component of the Institute is to collect data and analysis for the benefit of the worker in Zambia through various information dissemination avenues. ZILARD will use research as the key weapon in setting the agenda for the labour movement in Zambia. This is because research offers a starting point for bargaining for better and effective negotiations, and this will be accomplished through awareness with labour unions and the public in general.

Policy plays a key role in governments planning and implementation, hence it will be vital for ZILARD to be alert to the policy dimensions and how it affects the workers. Labour policy analysis and influence strategy will play a pivotal role in enhancing ZILARD's work and the labour movement in the country at large. ZILARD will conduct studies pertaining to political economic, environmental and social issues and on the continent as far as they pertain to labour. The research will have a particular focus on Zambia, SADC and African policy developments, the outcome thereof will be used to influence policy development and implementation on the continent. ZILARD as a labour think-tank will endeavor to build strategic partnerships at national, regional and international levels.

#### (b) Strategic Focus 1 Objectives

- To initiate and drive a demand-driven labour research and socio-economic policy analysis that will build the research capacity of trade unions to advocate for change through evidence-based policy positions in the interests of working people in Zambia and the world at large.
- To assist in the development of empirically informed trade union policy interventions at the national, regional and continental levels.

#### (c) Expected Outcomes

- Increased liaison with ZCTU affiliate and profile of research outputs.
- Trained labour researchers in research methodology
- Presence of active information database
- ZCTU affiliates research capacity enhanced.
- ZCTU affiliates research information database

- Increased intelligence/information and analysis capacity and communication capabilities of ZCTU affiliates
- Increased policy analysis capacity of affiliates
- Digitalization and archiving labour historical materials

### **7.3.2 Strategic Focus 2: Labour Education, Training and Capacity Building**

#### **(a) Rationale**

Education, training and capacity building are critical ingredients that can spur a modern and progress trade union movement. The research and education needs are many and varied highly complementary in many ZCTU affiliates. Some research educational needs identified during the benchmarking exercise include amongst others: leadership training, policy development and analysis. Others courses cited include Training of Trainers (TOTs) for labour education and basic research methodologies. However, the world of work and trade unionism is dynamic. The challenges that are brought about by such changes require that workers and their trade unions are equipped with the necessary skills and information to be able to respond appropriately and timely. The role of trade unions is also wide in that it includes assisting workers to confront oppressive political and economic regimes.

One of the most striking weaknesses that has been observed over time is the fact that trade unions in Zambia have not fully began to take up financial responsibilities for research services and ably linked them to their education programmes. It is also possible that there are many research outputs “gathering dust” in many trade union affiliates which have not been shared with a wider audience in the country and beyond. This is due to the fact that post-output or roll out plans are never in place and therefore the impact is difficult to measure. Many a times, the research report becomes an end in itself. ZILARD seeks to turn around this and will henceforth be a vehicle and platform for capacity development of the trade union movement in Zambia.

#### **(b) Strategic Focus 2 Objectives**

To provide the ZCTU and its affiliates with education, training and capacity building programmes and exchanges that would promote and strengthen their trade union identity and foster unity and cooperation.

#### **(c) Expected Strategic Outcomes and Outputs**

- Trade union value literacy among the affiliates
- Trainers of Trainers on research methodology.
- Literacy on labour law, regulations and processes
- General financial reviews and economic literacy courses;
- User-friendly training materials on labour and national development question such as employment, foreign and local investments, economic restructuring and privatization,
- Material publication of labour observatory trends, training, campaigns.

### **7.3.3 Strategic Focus 3: Information, Communication, advocacy and campaigns**

### **(a) Rationale**

Information and Communication has been argued to be the first step in being empowered in life. Hence, in the quest to empower the Zambian worker and employer, communication and education will play a pivotal role in advancing its mission and objectives for the labour movement in Zambia.

Communication and advocacy for the labour movement in Zambia will be a key strategy ZILARD will use to achieve its objectives. ZILARD recognizes the power in information dissemination and education especially when driven by the general citizens and supported by the labour movement. ZILARD will use various information dissemination channels available on various labour matters based on various researches conducted as well as for policy influence and impact.

### **(b) Strategic Focus 3 Objective**

To strengthen research as a tool for effective education, training and capacity building of trade unions through the provision of online and offline communication and advocacy platforms in the context labour and national developmental issues.

### **(c) Expected Strategic Outcomes and Outputs**

- Information, Communication and advocacy strategy
- Information, Communication and advocacy materials and kit for affiliates
- Information, Communication and advocacy online platform
- Quarterly Labour Observatory bulletins
- Labour Forum discussions

## **7.3.4 Strategic Focus 4: Smart alliance and partnership building**

### **(a) Rationale**

In establishing ZILARD, the labour movement in Zambia was inspired and followed the examples of the US, European, SADC, ECOWAS and specific benchmarking of experiences in the ALRN (South African, Zimbabwean and Namibian) trade unions. Since national policy is increasingly giving way to regional and international developments as a result of globalization, it is necessary that trade unions understand what is going on and adopt a proactive approach in building smart partnerships with like-minded stakeholders. ZILARD envisages identifying and linking up with like-minded organizations such as academia, ALRN, ALREI and other think-tanks in the research circle for a broader and wide policy influence and voice in the labour movement. Furthermore, the Institute will aim at reducing the gap between African academics and pro-labour researchers in order to ensure high-level quality outputs that are not only academically sound but also accompanied by practical implementation guidelines.

### **(b) Strategic Focus 4 Objective**

To create, strengthen alliance building and smart partnership with individuals and organisations that have common objectives, shared/similar values on social justice in Zambia and beyond,

**(c) Expected Strategic Outcomes and Outputs**

- Exchange programmes and networks established
- Programmes with partners approved
- Programmes with other regional bodies established

## 8. IMPLEMENTATION STRATEGY: ACHIEVING SPECIFIC TARGETS

This section presents the implementation strategy that will be employed to achieve specific targets. It thus elaborates on the activities and specific targets that would be carried out by ZILARD in order to achieve its strategic goal within the life of the strategic plan. The detailed milestones and specific outputs and timelines are presented in matrix in Table

**Strategic Focus Areas Matrix**

<b>STRATEGIC AREA</b>	<b>OBJECTIVES</b>	<b>ACTIVITES</b>	<b>TIME</b>	<b>RESPONSIBLE PERSON</b>	<b>SOURCE OF FUND</b>
<b>1. Labour research and socio-economic policy analysis</b>	To initiate and drive a demand-driven labour research and socio-economic policy analysis that will build the research capacity of trade unions to advocate for change through evidence-based policy positions in the interests of working people in Zambia and the world at large	Dissemination workshops	2018-2023	Executive Director	ZCTU, Development partners
		Media campaigns	2018-2023	Executive Director	ZILARD
	To assist in the development of empirically informed trade union policy interventions at the national, regional and continental levels.	Workshop to develop position paper for ZCTU affiliates	2018-2023	ZILARD Secretariat and associate researchers/experts.	ZCTU Affiliates/C operating partners
<b>2.Labour Education, Training and Capacity Building</b>	To provide the ZCTU and its affiliates with education, training and capacity building	Operationalisation of the labour education programmes in the affiliates	2018-2023	Executive Director	ZCTU Affiliates/C operating partners

	programmes and exchanges that would promote and strengthen their trade union identity and foster unity and cooperation.	Training of national affiliate researcher through action-oriented research	2018-2023	Executive Director	ZCTU Affiliates/C operating partners
		Train a pool of researchers	2018-2023	Associate Researchers	ZCTU Affiliates/C operating partners
			2018-2023	Associate Researchers	ZCTU Affiliates/C operating partners
<b>3.Information, Communication, advocacy and campaigns</b>	To strengthen research as a tool for effective education, training and capacity building of trade unions through the provision of online and offline communication and advocacy platforms in the context labour and national developmental issues.	Financial proposals	2020-2013	Executive Director	ZCTU Affiliates/C operating partners
		Build an information support system and database for ZILARD at the Institute	2018-2020	Executive Director	
		Training workshops and exchange on-site visits/training	2019	Executive Director	
<b>4. Smart Alliance partnership building</b>	To create, strengthen alliance building and smart partnership with individuals and organisations that have common objectives, shared/similar values on social justice in the Zambia and beyond,	MoU signed	2019	Executive Director	
		MoU signed	2018-2022	Executive Director	
		MoU signed	2018-2022	Executive Director	

## **9. MONITORING AND EVALUATION**

The implementation of the strategic plan will depend on the following critical success factors.

- Structural strength of the ZILARD Secretariat
- Responsiveness of the ZCTU affiliates structures to the current dynamics.
- Committed leadership in ZILARD levels to champion change.
- Structural strength of the ZILARD administrative structures to effectively monitor target through approved Committees with review periods and realistic accountability targets.
- Preparation of scheduled tasks and activities with clear delivery period by ZILARD.
- Securing finances resources by ZILARD to implement the specific activities.

## **10. ROLES AND RESPONSIBILITIES**

In addition to the core activities outlined in this strategic plan the responsibilities that are in its implementation are outlined below.

### **(a) ROLE OF THE ZILARD SECRETARIAT:**

- To support ZCTU affiliates implementing policy and programme interventions.
- Establishment of an interactive website that will promote information sharing among all the ZCTU affiliates, stakeholders and the general public; and promote increased collaborative efforts.
- Facilitate a forum to debate, share information, and strengthen collaboration on common priority areas.
- Ensure that all emerging issues relevant to the Strategic Plan programme are brought to the attention of ZCTU affiliates.
- Facilitate regional networking and collaboration amongst ZILARD affiliates and national stakeholders within the region on related issues.
- Support national and regional stakeholders in formulating advocacy and engagement action plans around identified priority issues.
- Increasing collaboration amongst ZCTU affiliates and other stakeholders within the region working on alternative development paradigms.
- Undertake specific engagement activities with regional policy frameworks such as COMESA, SADC Secretariat, and the Regional Parliamentary Forum.

## **(b) ROLE OF ZCTU SECRETARIAT**

- Support the ZILARD secretariat in the implementation of activities at the national level.
- Ensure that all relevant national stakeholders are involved in ZILARD related activities.
- To mainstream the ZILARD strategic plan (e.g. in thematic areas for workshops, programmes and strategic interventions) of the ZCTU affiliates.
- To support the monitoring, evaluation and reporting of the ZILARD Strategic Plan programme (i.e. provision of information on ZILARD related activities being implemented and their impact)
- Strive towards broadening the visibility of ZILARD beyond Zambia and SADC (e.g. through SATUCC, ITUC-Africa/ Global Union Federations).
- Support the ZILARD secretariat to identify priority areas and possible spaces for non-state actor's participation in consultation processes at the national and regional level.
- Undertake national lobbying and engagement activities with policy makers specifically on the decent work agenda, EPAs, implementation of the SADC protocols and international conventions and declarations related to poverty reduction and employment creation.
- Work towards harmonizing their policy positions on poverty reduction in line with the ZILARD Strategic Plan.

## **(c) ROLE OF STRATEGIC & ALLIANCE PARTNERS**

ZILARD intend to maintain and expand its current strategic and alliance partners who it expects to have the following role in the implementation of its strategic objectives:

- Mobilise their own resources to implement common activities with ZILARD at the regional and national levels.
- Work towards strengthening their national coordination and collaboration of activities related regional and national levels.
- Provide contribute information resources to the ZILARD Secretariat so as to strengthen information sharing, creating possible areas of cooperation/ collaboration, informing policy formulation and strategic regional and national interventions.
- Provide human and financial resources to support the ZILARD Secretariat in monitoring and evaluating the impact of the various activities in the Strategic Plan.

## 11. SUSTAINABILITY IN ZILARD STRATEGIC PLAN

For ZILARD to continue to perform and deliver projects and programmes to its affiliates there is need to indicate how this strategic plan will be sustainable even after the support from partners terminates. Sustainability is therefore the need to maintain and continue programmes after the funding is over. There will need for the following to sustain the ZILARD Strategic Plan:

- (a) **Financial sustainability**- where the organisation will have to ensure a steady flow of funds and generating revenue for maintaining and continuing ZILARD's work.
- (b) **Organizational stability** - ensuring proper working of ZILARD administrative structures that drive the plan.
- (c) **Programmatic sustainability** – where there will be a continuation of the organisations projects and programme in the absence of cooperating partners support.

### 11.1 Financial Sustainability

This involves:

- **Service fee and Sale of product:** Offer research consultancies at a fee. Some of the research hat ZILARD produces can be sold. This may not be a huge amount but will help you to continue our efforts.
- **Diversifying Co-operating partners**
- **Membership fees**
- **Online Fundraising:** Online fundraising can help you reach a wide audience and individuals who like your project can fund you.
- **In-kind donations:** ZILARD will not only look at financial support from partners and affiliates, in-kind support can also help us in sustaining some of our project activities.
- **Contribution of stronger or wealthier federations:** The stronger or wealthier affiliates could contribute to a national trade union research solidarity fund. This fund should be able, among others, to offer specialized research to ZCTU affiliates

### 11.2 Institutional and Organizational Sustainability

This involves:

- **Explore new opportunities:** Keep a flexible approach we may have to modify our priorities to adapt to changes.
- **Develop new partnerships:** will also help you in taking your mission ahead.
- **Boost existing relations:** Along with investing time and energy on developing new partnerships it is equally important that we manage existing relations with co-operating partners, stakeholders, partners in a proper way.

- **Communication and Outreach:** Have a strong communication strategy that can help us in showcasing our project results to a large audience. Constant updating our webpage, social media profile, sending partners mails etc.
- **Volunteer and Internship engagement:** sustain our projects through engaging volunteers and interns for performing some activities. As volunteers do not take any salary we can use this human resource to continue our mission without spending money.

### 11.3 Programmatic sustainability

This involves:

- **Union Membership involvement:** involving members is the key to have long term impacts from any projects. ZILARD will make sure that projects involves union members at various stages, this will give them ownership of the projects and there are high chances that they may continue with some project aspects even after the project duration. As the entire process will be participatory the skills and knowledge gained by the present group of people, will be transferable and also replicable.
- **Community advocacy:** Sensitizing the community about the benefits of a particular project and then initiating a policy advocacy can also ensure sustainability in the long run.
- **Involving government institutions and authorities:** Involvement of government will ensure improved access to the government initiatives in this direction. As these agencies are permanent, they will help in sustaining the project activities beyond the project duration.