



STRATEGIC PLAN 2018 - 2023

DECEMBER, 2018

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LIST OF ABBREVIATIONS AND ACRONYMS

ALREI	African Labour Research and Education Institute
COMESA	Common Market for Eastern and Southern Africa
CSO	Central Statistics Office, Zambia
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
UNEACA	United Nations Economic Commission for Africa
ZCTU	Zambia Congress of Trade Unions
ZDHS	Zambia Demographic and Health Survey
ZILARD	Zambia Institute for Labour Research and Development

FOREWORD

The inspiration for establishment of Zambia Institute for Labour Research and Development (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 accordingly 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 Zambia Congress of Trade Unions (ZCTU) and undeniably the entire 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, continent, SADC region 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 a well-informed and knowledge nourished leadership in the ZCTU mainstream organisational 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 the ZCTU to survive, union leadership needs to win commitment from its members from within and outside its ranks through solidarity and collective effort based on evidence-based research. 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 sing with them the songs of exploitative desolation for true emancipation. I also believe that the document will instill a sense of hope for dignity, self-pride and liberation among the workers in Zambia.

Mr. Cosmas Mukuka
ACTING BOARD CHAIRPERSON, ZILARD

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This Strategic Plan (2018-2023) was prepared by staff at the ZILARD Secretariat, namely: Prof. Trywell Kalusopa (Executive Director), Mr. Francis Jamani Phiri (Communications & Programmes Manager) and Mrs. Mubanga Simukanga (Research Administrative Manager). The ZCTU Secretary General (Mr. Cosmas Mukuka), ZCTU Executive Board, ZCTU Affiliates, ZILARD Board and ZILARD Associate Researchers are acknowledged for their sterling input.

1. INTRODUCTION

- 1.1 This is a 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 Unions (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 the ZILARD Board, ZCTU Board and Executive 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; (i) critical factors for the success; (j) role of the key ZILARD institutional organs and allied strategic partners; and, (k) sustainability of the strategic plan.

2. SOCIO-ECONOMIC TRENDS AND CONTEXT IN ZAMBIA

- 2.1 Zambia is endowed with massive natural resources with an estimated 16 million people of whom 51% are women and 49% men (CSO, 2018). Zambia has immense inequality and poverty challenges, despite the huge potential for sustainable economic growth and development given its rich natural resources such as: copper, cobalt, zinc, lead, coal, emeralds, gold, silver, uranium, hydropower, petroleum, tin, nickel, bauxite, phosphate, natural gas, fish, rivers, wildlife, forestry and timber, among others. The failure of a strong macro-economic position to translate these natural resources into a reduction in poverty, inequalities and spur improved general living conditions for the majority of the Zambians is associated with the poor governance model; whereby there has been no meaningful structural transformation and expansion in job creation despite major foreign investments and past gains in economic growth. The benefits of Gross Domestic Product (GDP) growth have accrued mainly to the richer segments or enclaves of the population in urban areas; accordingly, Zambia has a very unequal distribution of wealth and income. The 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)

- 2.2 In the second quarter of 2018, the economy grew by 3.9 percent indicating a 0.5 percentage points increase from 3.4 percent recorded in the second quarter of 2017 (CSO, 2018). This continued constrained and slow economic outlook arises from a heavy external debt burden, with a depreciation in the kwacha exacerbating debt-servicing costs, thus putting the economy at increasing risk of debt distress and further credit rating downgrades (CSO, 2018). The government's debt sustainability analysis (DSA) in H1 2018 confirmed the conclusion of a joint IMF-World DSA (published in October 2017) that Zambia is at 'high' risk of external debt distress. Under the 'business as usual scenario', the IMF-World DSA found that the present value (PV) of external debt-to-GDP (gross domestic product) ratio would breach its threshold 'for high risk of external debt distress' (40 per cent) in 2019, if external public and publicly guaranteed debt stock increased from US\$7.9 billion in 2016 to US\$8.4 billion in 2017, US\$10.2 billion in 2018 and US\$11.4 billion in 2019. Most economic pundits predict GDP to grow 3.6% in 2019, which is down 0.5 percentage points from last month's forecast, and 4.1% in 2020.
- 2.3 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).
- 2.4 According to the second quarter 2018 Labour Force Survey (LFS), 3,336,411 people were in the labour force, of which 2,957,520 were employed and 378,891 were unemployed. Survey results also show that 59.9 percent of the labour force were male and 40.1 percent were female. Furthermore, majority of people in the labour force were in urban areas (60.3 percent) than in rural areas (39.7 percent)

Based on the national/extended definition, the results from the second quarter 2018 LFS shows that the estimated number of unemployed persons was 2,159,444 of which 51.4 percent were females and 48.6 percent were males. In addition, 58.5 percent of the unemployed population were in rural areas while 41.5 percent were in urban areas. The unemployment rate was 42.2 percent in the second quarter of 2018. Unemployment rate was higher in rural areas compared to urban areas at 51.7 and 33.5 percent respectively. Youth unemployment rate was estimated at 50.8 percent based on a national/extended definition. It was higher in rural areas at 57.5 percent than was in urban areas at 44.5 percent.

2.5 Zambia has ratified five ILO Conventions (C081, C129, C155, C187, and C181). The national legislative framework has evolved over time. The Employment Act of 1965, as amended in 1997, regulates individual employment relations such as hiring, firing, payment of wages and working hours. It also regulates labour inspection, employment agencies, when disputes are to be conferred to other authorities and the power of courts in labour matters. The Industrial and Labour Relations Act (ILRA) of 1993 was amended in 1997, to regulate trade unions, employers' organisations, collective bargaining, strikes, lockouts, industrial disputes and establishes the Industrial Relations Court. During 2013 the ILO reported that most of the amendments to the ILRA proposed by the government in response to ILO recommendations had still not been taken into account during the labor law review process and this remains so to date. The Minimum Wages and Conditions of Employment Act of 1992 makes specific provision for the protection of minimum wage levels and minimum conditions of employment. 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. The Factories Act of 1966 amended in 1994, regulates working conditions and labour inspection in factories. It sets specific standards for various elements of Occupational Safety and Health in factories. The Workers Compensation Act from 1999 regulates compensation to workers for disabilities suffered or diseases contracted during the course of employment

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 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, such as 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. Currently, new labour reforms are underway. (Ministry of Labour & Social Security, 2017).

3. CONTEXTUAL ANALYSIS OF ZILARD STRATEGIC PLAN

- 3.1 The ZCTU has now established under guarantee an autonomous labour research institute called the Zambia Institute for Labour Research and Development (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 other 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 is now prudent that in order for ZILARD to enhance, and effectively execute its mandate, there is a need for a strategic plan and operational working framework that will act as the blueprint and guide for its work. This strategic plan therefore addresses thematic areas anchored on the current national labour challenges alluded to in Zambia's seventh development plan, the ZCTU strategic plan, country decent work programme and the future of work agenda. This implies that

the ZILARD strategic research agenda will be firmly aligned to the ZCTU strategic direction and the key pillars of the DWA and will reflect relevant current labour market issues in Zambia.

- 3.6 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 ACTORS FOR THE EXISTENCE OF ZILARD.

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

Table 1: Strength, weaknesses and opportunities for the research in Zambia

Current state of labour research in Zambia	Strengths	Weaknesses & threats	Opportunities
There is no credible trade union research institute (before launch of ZILARD)	Increased realisation by more trade unions that research is important	Uncoordinated research outcomes at national and regional level	More and more organisations (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 union affiliate of the ZCTU	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 organisations, government and civil society organisations 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)	Neo-liberal hegemonies whose influence undermines pro-labour development policies	Leadership willingness to develop some research capacity in some trade unions at national level

Current state of labour research in Zambia	Strengths	Weaknesses & threats	Opportunities
Research departments poorly capacitated	Existing & organised trade union membership which is becoming conscious of the importance of research at the regional, national and continental level	Outcomes poorly shared with other actors	Recognition of the importance of research at regional level especially by regional 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"> • Low research capacity at national centre • Uneven research capacity at national level • Research outputs seen as ends in themselves • Work-overload for the few people with labour research expertise in the ZCTU 	<ul style="list-style-type: none"> • Trade unions to engage other social partners in policy formulation as an opportunity for research • Capacity within some of the National Centres (availability of research institutes in the region and continent) • Existence of potential partners who can help with logistical and technical support • There are policy gaps across country and Africa in terms of a pro-labour development agenda that will require to explore and advocate • Raising awareness about the importance of evidence-based demands

5. STAKEHOLDER ANALYSIS AND ZILARD COLLABORATION

- 5.1 Over the years, the ZCTU has been implementing research activities in line with the changing developments and emerging challenges. Before the establishment of ZILARD, the ZCTU Research Department were able, albeit 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 organisations. 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
TECHNICAL SUPPORT INSTITUTIONS		
<ol style="list-style-type: none"> 1. ILO ACTRAV, Regional and Geneva Office) 2. SATUCC and ALREI ITUC-Africa 3. Labour Research Institutes and Academia 	<ol style="list-style-type: none"> 1. Technical support 2. Research & innovation 3. Capacity development 4. Policy Advocacy 	<ol style="list-style-type: none"> 1. Knowledge sharing/learning 2. Innovation 3. Capacity development
GOVERNMENT/ AUTHORITIES		
<ol style="list-style-type: none"> 1. National Government 2. Ministries 3. (Labour, Education, Finance, etc.) 4. SADC and its Institutions (Summit, Council of Ministers,) 5. AU, UNECA, NEPAD 	<ol style="list-style-type: none"> 1. Regulation & oversight 2. Public service delivery 3. Project implementation 4. Policy (re)formulation 	<ol style="list-style-type: none"> 1. Joint coordination and planning of programmes 2. Capacity development 3. Policy development

CO-OPERATING PARTNERS		
<ol style="list-style-type: none"> 1. ILO, LOFTF, SOLIDARITY CENTER, FNV, FES, LO-Norway 2. UN AGENCIES, AfDB 3. Other Trade Union Co-operating Partners 	<ol style="list-style-type: none"> 1. Offer project publicity 2. Technical and financial backstopping 3. Networking 	<ol style="list-style-type: none"> 1. Project implementation 2. Learning and knowledge sharing 3. Program development. 4. Joint fundraising
SOLIDARITY ORGANISATIONS		
<ol style="list-style-type: none"> 1. Sub-Regional Organisations (SATUCC) 2. ITUC-Africa and OATUU 3. GUFs 	<ol style="list-style-type: none"> 1. Technical support 2. Capacity building 	<ol style="list-style-type: none"> 1. Joint coordination and planning of programmes 2. Shared learning 3. Financing 4. Networking 5. Joint project implementation
CIVIL SOCIETY ORGANISATIONS		
<ol style="list-style-type: none"> 1. Non-Governmental Organisations 2. CBOs/ community based institutions 	<ol style="list-style-type: none"> 1. Funding 2. Projects implementation 3. Capacity building 	<ol style="list-style-type: none"> 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 guaranteed 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 for effective 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 its stake in the national, regional, continental and global political economy, ZILARD seeks 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 an autonomous labour research and education centre of excellence for the ZCTU, envisioned that ZILARD will 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. It was envisaged that such service will be towards strengthening the socio-economic dimensional capacity of the Zambian trade unions to integrate 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 themes:

- Economic governance systems and labour relations.
- Worker participation and industrial relations.
- Sustainable development and industrial policy.
- Transitioning of informal to formal economy and Social Protection.
- Future of work, working conditions and job quality.
- Trade union renewal, organisation and recruitment.

7.3 The ZILARD organisational 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 workers 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 government's planning and implementation, hence it will be vital for ZILARD to be alert to the policy dimensions and how these affect 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 at all these levels. 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.
- Digitisation 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 progressive 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 is undoubtedly the first step in being empowered in life. Hence, in the quest to empower the Zambian worker, 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 recognises the power in information dissemination and education especially when driven by the general citizens and supported by the labour movement. ZILARD will 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 (e.g. South Africa, Zimbabwe and Namibia) trade unions. Since national policy is increasingly giving way to regional and international developments as a result of globalisation; 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 organisations 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 the 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 3.

Table 3: Strategic Focus Areas Matrix

STRATEGIC AREA	OBJECTIVES	ACTIVITIES	TIME	RESPONSIBLE PERSON	SOURCE OF FUND
1. Labour research and socio-economic policy analysis	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/Cooperating partners
2. Labour Education, Training and Capacity Building	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.	Operationalisation of the labour education programmes in the affiliates	2018-2023	Executive Director	ZCTU Affiliates/Cooperating partners
		Training of national affiliate researcher through action-oriented research	2018-2023	Executive Director	ZCTU Affiliates/Cooperating partners
		Train a pool of researchers	2018-2023	Associate Researchers	ZCTU Affiliates/Cooperating partners
			2018-2023	Associate Researchers	ZCTU Affiliates/Cooperating partners

3. Information, Communication, advocacy and campaigns	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/Cooperating 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	
4. Smart Alliance partnership building	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, EAC 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)** Organisational 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.

11.2 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.

11.3 Institutional and Organisational 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.

11.4 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.

SUPPORTED BY



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