

Discussion papers

DP/100/1999

Labour
and
Society
Programme

**Trade unions
and
development**

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ISBN 92-9014-608-7

First published 1999

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Requests for this publication should be sent to: IILS Publications, International Institute for Labour Studies, P.O. Box 6, CH-1211 Geneva 22 (Switzerland).

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Trade unions and development

Henk Thomas¹

1. Introduction

This paper raises a number of issues which reflect on the role of the labour movement in development processes and broad social transformation, particularly in Asia, Africa, Latin and Central America. Its objective is to explore a new methodology to analyse the trade union movement in a context which has not been exposed to either the Western European model of welfare state involvement or the Anglo-Saxon model of strong collective bargaining. This appears necessary since in numerous newly industrialized and/or yet to be industrialized countries labour market conditions are such that traditional industrial relations patterns no longer offer effective guidelines for policy design and action. In the specific context of the current ILS research agenda the theme “Partnership in development programmes” forms part of the ‘broader agenda for union action’ (IILS, 1998, pp. 8-9). The IILS policy design paper for this project approaches this theme in the following manner:

“The labour movement has a major role to play in sustainable development and participatory democracy. Trade unions as a large organized group in civil society can bring a unique contribution to the development community. They are directly involved with economic systems of production and distribution; they can influence the course and content of employment and social and economic policies; they are representative and accountable; they have considerable experience in organising the more vulnerable sections of society; and they have the experience and standing required to access national legal systems and public facilities. They can contribute through their long-standing relationships with such development institutions as: consumer co-operatives, housing societies, health funds and social security organizations. Research can serve the following objectives:

- a. To highlight the potential role of trade unions as development partners in order to change misconceptions of unions by the development community as part of the problem rather than as part of the solution.
- b. To establish a case with donor agencies and global financial institutions for greater collaboration with trade unions in development programmes (IILS, 1998, p. 9).”

This statement conveys a range of hypotheses regarding the strength and potential of trade unions required to play a major role in processes of development and socioeconomic restructuring while adding a normative flavour to the extent that they should certainly play such roles with determination.

¹ Dr. Henk Thomas is Professor of Labour Studies at the Institute of Social Studies (ISS), The Hague, The Netherlands. Comments on an earlier draft by Rudy Moonilal, Freek Schiphorst, and Hagen-Koo as well as by participants at a workshop organized at the International Institute for Labour Studies (IILS), held in Geneva in December 1998, are gratefully acknowledged.

Trade unions have a very good record indeed in this respect, particularly in the industrialized countries during the last century. First the creation of welfare states, of welfare mechanisms and safety nets, and more recently the process of reshaping of the public social agenda have provided ample evidence of the wider societal roles which trade unions have played in a sizeable number of industrialized countries over a long time span.

Here the Western European countries come initially to mind the labour movement has continued to acquire a high degree of legitimacy in addressing issues of the wider social agenda. One may also mention the role of the labour movement in the transformation and restructuring that was called for in Western Europe after the Second World War. Similarly, more recent examples can be given of the role which trade unions have played in restructuring the economy, such as the need for wage restraints in the 1980s when global competitive forces had a huge impact on the reshaping of Western European economic structures as well as on major characteristics of labour markets. Also, the distinct role that trade unions have played in enterprise restructuring, such as in the restructuring of the automobile industry in the United States, is proof of union strength and potential that are important from the broader perspective of a national social agenda in countries where the Anglo-Saxon model of labour relations prevails.²

The current scene of “development” in less industrialized countries outside Western Europe, North America, Australia and New Zealand, generally paints a very different picture.³ In numerous countries the labour movement has not had the opportunity to develop its potential strength due to the structural characteristics of development patterns.⁴ Trade unions mainly became established in the public sector which proved, from the 1970s onwards, to be the cause of much anxiety. In addition, the processes of urbanization and of demographic forces were such that complete new patterns of labour market structures emerged with huge “informal sectors” and cut-throat capitalist behaviour in the “formal sector”. Also, privatization of large public sectors has frequently led to serious erosion of the labour movement while the growth of underemployment and unemployment did little to allow for the enhancement of bargaining power. In a number of exceptions, such as the development dialogue and roles that are characteristic of South Africa and Brazil, there is a general trend of trade union erosion which hampers its role of becoming a critical institution in development. In anycase, we would argue that an analysis of the developmental roles of the labour movement needs to start realistically by examining aspects of strength and weakness that can be identified in specific labour markets in different parts of the world.

A special policy issue forms the role which “development cooperation” may play in strengthening the position of trade unions in weak labour markets and in situations where as yet no organizational labour strength could be built. “Development cooperation” both bilateral and multilateral has at times allowed for generous donations to the trade union movement. For example, special subsidies granted to “donor” trade unions to enable programmes of institutional building for the “receiving” labour organizations. Such funding may have a “national” approach and thus contribute to the building and expansion of strong programmes of international

² See Bluestone and Bluestone (1992); see also views as expressed by John Monks, TUC General Secretary, Press Release from the TUC dated 9 September 1996 when he summarizes how “...Our challenge is to prove we can be part of the solution:” namely of numerous problems faced by workers in current labour market restructuring (Press Release, p. 1).

³ The New Zealand case stands out as a case in question as here the welfare state achievements of the past were eradicated drastically in a very short time span. See Kelsey (1995), for an analysis of the high price that had to be paid in social, cultural, democratic and even economic terms. Hence (1995) presents the dilemmas that the labour movement faces in these circumstances.

⁴ COSA TU (1997) has shown the huge dilemma the labour movement is facing under conditions of deep structural transformation.

cooperation.⁵ Also, cases such as the Danish one, with a strong preference for multilateral channelling of funds, e.g. through the ILO or ICFTU, each with its regional headquarters, have become part of the current donor scene.

Such extra effort may be particularly appropriate to address innovative themes as mentioned above. The question then arises whether development cooperation has adequately addressed the dilemmas which have arisen with respect to new models of industrialization, to new demands for human resource development, to the requirements of small-scale microenterprises, along with a more direct social agenda including working conditions, child labour, and discriminatory practices, to mention only a few obvious policy themes.⁶

In this preliminary stage of the research effort to be undertaken by the ILS in some 16 countries, obviously an urgent issue concerns the choice of the appropriate methodology. Major dilemmas emerge as one of the objectives is to gain, minimally, new insights into worthwhile experiments and innovative strategies. Given the large number of sectors and countries in which trade union strength has been eroded, a representative sample of cases might readily confirm the gloomy trends that have been widely observed. A different approach is to be selective in choosing cases; and selective with respect to the choice of countries, of sectors, of scale of production, of institutions and specific themes. The objective is, as is the case with the current ILS study, to explore feasible ways of strengthening the trade union movement in situations where the outlook may otherwise be even more gloomy as current negative trends continue in the near future. Such a more eclectic approach in other fields has been called a “best practices” methodology. A “best practices” approach in recent years has become an interesting methodology to analyse complex phenomena with a high policy content. This approach ensures some degree of statistical representation as well as a high degree of policy relevance which is mainly a matter of great concern to the institutions that undertake the research.

Given the generally unfavourable labour situation, the term “best practice” should be applied with reservation. Firstly, because it does not define the criteria with which the practice is to be assessed; secondly, since the current uncertainties would call for a less euphoric term than “best practices” which indicates that there is a good chance of success. We still like to apply this concept in an attempt to explore and to apply an innovative methodology to the wide field of labour, employment and work studies.⁷ In the context of the current ILS study, the specific objective is to ascertain whether trade unions, even under highly adverse circumstances, can still play a significant role in developmental transformation alongside survival in the more traditional roles that relate to industrial relations in medium to large enterprises, mostly of a public nature. Variations in labour relations, as between countries, provide a convenient starting point for analysis. As an ILO report states, “Different countries have experimented with different

⁵ The Netherlands Co-Financing programme, the agreement of which was signed by the Government with the trade union confederations here in Geneva, is a good example. The Netherlands Con-Federation, FNV, has developed a comprehensive view on developments in the global labour market and the role which international cooperation may play (FNV, Mondiaal, 1997).

⁶ See Kruijt, Thomas and van der Salm (1996). The National Social Council, SER, in 1997 published one of its studies on *De particuliere sector in internationale samenwerking*, in which it was emphasized that the development cooperation programme should pay special attention to the employment impact of its numerous programmes.

⁷ The “best practices” methodology has recently received a relative degree of general acceptability. We refer to research undertaken by UNDP and NGOs. Under the International Social Science Council in Jordan, a workshop is being organized in 1999 “...to help develop a framework for a project on best practices in poverty reduction ...with a focus on two questions. 1. How can a “best practice” in relation to a certain kind of poverty reduction be described and analysed and 2. How can the context in which the best practice works be described and analysed.” See also <http://www.unesco.org/most/> for more information. Another example is a recent initiative by UNESCO to build a database of *best practices related to indigenous knowledge*; see <http://www.nuffic.nl/ciran/>

approaches and there are lessons to be learned from their varied experiences” (ILO, 1997, p. 232). Here there would be a risk of creating an optimistic scenario of such “best practices” which, when amended to meet with the requirements of other countries, could be copied elsewhere as well.

Given the orientation in the ILS research project on “development and transformation” this paper focuses in particular on developments in Africa, Asia and Latin and Central America. The next section (2) provides a framework in which the great differences between continents and sub-regions may be analysed.⁸ To prevent too high a level of abstraction an obvious approach is to take sub-continental labour market characteristics as a point of departure for this study. Since the national labour situation for most trade unions is a key point of reference we believe it is important to reflect on changing “national perspectives” in order to explore which external factors have an impact on the trade unions themselves and what developmental options are available. In section (3) as used in this paper, we present a recent case study on Trinidad and Tobago as an illustration of “best practice” of a methodological approach which may be effective.

Section (4) focuses on the potential, which even weak trade unions possess, to build relatively independent centres to address major issues of relevance for the trade union movement itself and for development at large; in short, the role of institution building as a practice to be examined critically. Cases from Pakistan and India will be examined here in some detail. Section (5) focuses on a few themes which are of strategic value to the trade union movement if it is to play a role in development. “Women and trade unions” is selected as a theme for illustration. A concluding section (6) reflects an amalgamation of the findings of the paper.

Regional labour markets

2.

Already in the early 1970s a major effort was being made at the ILS to design the contours of regional labour markets, each with its own labour and industrial relations characteristics.⁹ The current Track 2 research effort may be less ambitious as compared to the earlier research programme, yet, the focus on 16 different cases implies that the aim is now to outline the great differences between countries in terms of labour, work and employment issues.

Trade union organizations largely derive their characteristics, heritage, identity and future strategic options from the parameters that are set by the country in which they function. In addition, global networks have emerged, regional coalitions and organizations have been established, while at the same time sub-national (meso) phenomena require necessary action. However, it is the national domain that is probably the most decisive when analysing the development roles which trade unions may play.

Generalizations about the role which trade unions can play in development are thus bound to be of limited relevance; the conditioning national, sub-national and supra-national regional factors need to be taken into account. The ILO in its impressive *World Labour Report 1997-98* has shown convincingly that the field of “industrial relations” has undergone dramatic changes which imply greater global divergence between different systems rather than a convergence towards common sets of institutions and practices:

“...each country’s social heritage is profoundly distinctive. Clearly one cannot simply seek to reproduce elsewhere something that derives from another State’s history. In spite of this, everyone has

⁸ Thomas (1995) has shown that a regional approach to comparative employment and labour research is feasible and yields important findings.

⁹ See in particular Cox R., Harrod J., and others (1972). This study summarizes a series of monographs, each dealing with a particular regional approach towards labour market and industrial relations developments.

an interest, more than ever before, in knowing how others respond to the everlasting issue of how one can balance economic efficiency and concern for the individual. (ILO, 1997, p. 231)

In order to proceed to a new level of understanding careful reflection on an adequate methodological and conceptual approach is mandatory. The ILO Report has taken a distinct stance by recognizing the diversity of challenges which are to be met in different parts of the world.¹⁰ This approach is also valuable in the search for answers on the question of which role trade unions may play as development partners. The introductory chapter of the ILO Report (1997) provides a realistic, largely adverse, combination of global trends for the years to come. Our thesis would be that this combination should be applied in such a way that the study of regional and national labour markets forms an integral part of this global and comparative analysis.

Up until now the differences between labour markets belonging to regions and sub-regions has been given insufficient attention in the systematic search for role models that trade unions can follow in the next century. An attempt to apply such a methodology has been reported in a study which has shown distinct differences in labour relations, labour markets and in the associated complexities of labour institutions as these relate to major regions of development and industrialization in Asia, Africa, Latin and Central America (Thomas, 1995). Differences in income per capita, in domestic product growth, urbanization and population pressures, gender composition in labour markets, and economic restructuring as between agriculture, industry and services, define major challenges which trade unions face in the different labour markets where people work and earn a living.¹¹ Obviously this is only one of a number of points in addition to, in particular, the political, social and specific historical variables that are to be taken into account; and these form central features in analysing different patterns of industrial relations. Yet, certain common patterns emerge on which we shall briefly elaborate in this section.

2.1 Asia

In Asia, after the Chinese and Pacific regions, three major highly differentiated trajectories are distinguishable. In East Asia, over the past few decades, there has been a substantial tightening of labour markets as a result of remarkable economic restructuring and a most impressive industrialization process. The labour movement in a distinct way has managed to adopt new strategies that are conditioned by the particular conditions in each country. For instance, in South Korea the trade union movement managed to battle for basic labour rights and improvement of working conditions, while lately its assertive role in the processes of re-structuring has become widely known. The Japanese involvement has been far more modest as the labour movement became encapsulated in the specific characteristics of the Japanese corporate structures. It is striking that in Singapore new roles have been defined in terms of the trade union movement being associated with the implementation of welfare schemes. One tends to conclude that an “adversarial” model of labour relations is still prevalent in South Korea contrasting with the “accommodating” model which was in Singapore.

The picture in South-East Asia is very different, particularly since the labour market situation in this second “layer” of industrialization has become so adverse to any strengthening of labour organization. Incidental outstanding labour leadership, such as is currently the case in Indonesia,

¹⁰ The *World Labour Report 1997-98* devotes a chapter to new patterns in Central and Eastern Europe; separate chapters on industrialized countries and labour markets with large informal sectors show how divergent the labour situation in a global comparative perspective may become.

¹¹ See in Thomas, *op. cit.* pp. 247-251 for the value of comparative statistical information when well-known international statistics are ordered from an employment and labour market perspective.

or the efforts to organize and safeguard the position of members as implemented in the Philippines, Malaysia and Thailand, do not provide an encouraging ground to define strategic roles which the labour movement can play in development. Next to the labour market pressures the politically adverse conditions obviously define the available options for actions.

The South Asian scene offers a complex panorama, less so in Bangladesh and Nepal, but particularly in India, and to an extent in Pakistan. In spite of the most adverse labour market conditions, the political scene has allowed a degree of manoeuvrability that permits some interesting experiments: for instance, the unique Pakistan Institute for Labour Education and Research (PILER) in Karachi, or the initiatives taken by certain Indian labour leaders to establish a Centre for Worker Management (CWM) in Delhi to search for meaningful solutions to the long overdue process of privatisation of the huge public sector. These experiences may be taken with all their possible shortcomings as “best practices” to which mention is made below. Apparently there is freedom to initiate what one may call “niche developmental” roles. At the same time, it must be realized that the labour market conditions are highly adverse and thus the options for trade unions to play an effective role in development are bound to remain extremely limited. In Asia, probably the greatest concern for the trade union movement is overcoming the ideology of past decades that rapid restructuring and industrialization could be sustained without professional and modern trade union involvement. The indicators of the recent crisis are telling in this respect but it will be a long time before trade unions will be fully accepted as indispensable institutions in the next stage of development.¹² For example, in a recent study, Ramaswamy, an outstanding student of Indian industrial relations, concludes: “The labour movement is caught in a crisis without precedent.” He continues on the lack of understanding between management and trade unions:

“This sense of adversarialism prevents labour from joining hands with management to protect their common interest. Capital is of course to blame for the distrust but so is labour’s view of capital as an adversary which is necessarily wrong” (Ramaswamy, 1999).

2.2 Africa

Characteristics in major parts of Africa differ markedly from elsewhere. The adverse labour market conditions, as well as uncertainties regarding feasible directions of processes of restructuring and industrialization, form an unfavourable backdrop for a trade union movement that is still largely anchored to the public sector. Informalization of economies as well as casualization of labour relations form such daunting challenges that the very survival of trade unions in a number of situations is at stake.

Downsizing and retrenchment in the public sector have hit hard at the core sectors with which the trade unions felt most immediately associated. Prospects for growth of employment in the “formal sector” are grim, while shortcomings in technological achievements form a permanent threat to the already seriously eroded levels of real wages.¹³ “Human capital development” has become a central theme in the latest annual report by the African Development Bank as it stresses the importance of education, training, and health programmes to strengthen one of the most strategic factors for promoting development (African Development Bank, 1998). This is also widely recognized also in the labour movement as an issue of the highest priority since evidence

¹² For a recent comprehensive South Asia study, see Chandra *et al.* (Chandra, 1998). Both the analysis of labour market transformation and of changing patterns of industrial relations show dramatic perspectives in terms of a seriously fragmented and defensive trade union movement.

¹³ See van der Geest and Wignaraja (1995) .

shows that variations in labour productivity are associated with technological competencies (van der Geest and Wignaraja, 1995).

One example of this is the situation in South Africa where the Department of Labour produced an impressive Green Paper on *Skills Development Strategy for Economic and Employment Growth in South Africa* (Department of Labour, 1997) which inspired a "Debate" in the South African Labour Bulletin. The "labour" response criticizes the "supply" bias in the Green Paper and doubts whether additional jobs will be created and, if they are, whether they will require the specific skills that are to be encouraged with the introduction of new policies.

Another example of the widely differing nature of the manner in which trade unions address major issues of political development is a ten-year project – the African Workers' Participation Development Programme (APADEP) – which sought in many countries to systematically establish bridges between researchers and trade unions in a "cooperative university/trade union project" (Kester and Sidibe, 1997). While acknowledging the worsening labour market conditions and its institutions under structural adjustment, the initiators of this complex venture succeeded in encouraging numerous initiatives that allowed and stimulated trade unions to promote democracy in countries where the political process was in serious jeopardy.¹⁴

This very trite statement has served to show that in this part of the world as well, a large region, consisting of numerous countries, has common characteristics which allow for broader social and economic analysis as well as for initiatives which extend far beyond the confines of a single country.

2.3 Latin and Central America

Again the Latin and Central American scene displays its own characteristics. Here the trade union became well established in an early round of industrialization at the beginning of this century. It thus acquired full legitimacy as it became a national partner of development during the long process of imports substituting protective industrialization. Also, during the 1980s its high commitment to the processes of democratization, during a decade when dictatorial regimes had won the day, led to great social status. It could hardly have been foreseen that a most difficult period would be in the offing since with the demise of the previous industrialization model most of the earlier privileges had to be surrendered. Poverty, informalization, and social exclusion led to a high degree of vulnerability for bygone well-established categories of workers (Kruijt *et al.*, 1996). The end of adverse trends is not in sight. Kruijt therefore concludes in a survey that: 'The labour movements in Colombia and Peru have now probably confronted the worst of the crushing blows received over the past fifteen years' (Kruijt, 1996, p. 78). For instance, in Costa Rica the ongoing weakening of the workers' situation in the labour market with regard to its organizational capacity has been verified by Salas in an innovative "index of precariousness". Statistics which illustrate the rapid worsening of the index in large firms, the situation of men, middle-aged workers, and educated workers, are indicators of the grim outlook and challenges which the trade unions, already considerably weakened, are facing. (Salas, 1998).

A positive development is the insight gained by many trade union leaders that coalitions with NGOs, which are strongly rooted among these vulnerable informal workers, are providing new

¹⁴ Kester and Ousmane Oumarou Sidibe (1997) give a good account of the project which was concluded with an international conference in 1997, held in Dar-es-Salaam, Tanzania (report forthcoming). It is worthwhile noting that the editors observe in particular sufficient evidence of innovative new trends and conclude: "Unions are now experiencing change; they are reorganising and taking fresh bearings. As we can see from the descriptions in this book of the situation in ten African countries, trade unions are coming to grips with their problems. There is no question of them throwing in the towel" (*op. cit.* p.16).

roles for the trade unions. Similarly, the support and cooperation given by trade unions to professional labour research centres, as has been the case for many years at DIEESE in Brazil and also at CUT (the National Trade Union Federation), where numerous faculties from university departments have formed a welcome teaching and research support structure, form an innovative strategy which appears to have a strong impact.¹⁵

In this continent the strong institutional structures of the past are still in place, whether they be national, continental or sectoral, and their restructuring may hopefully still be carried out in time to regain national stature by addressing national development issues which are of particular concern to the casual and informal men and women who make up the large majority in Latin and Central American labour markets. This section has indicated how, in Asia, Africa, and Latin America, the room for initiatives by the trade union movement is conditioned particularly by labour market developments in a long-term structural sense. Demographic pressures, processes of urbanization, new models of industrial organization, requirements of macroeconomic structural adjustments followed by the current economic crisis are all factors which seriously jeopardize the development potential of the trade union movement in large areas of Asia, Africa, Latin and Central America – the key regions of “development”. The institutional capacities of the labour movement appear to have weakened due to a structural trend and not as a reflection of an incidental dip due to an unfortunate complex of historically adverse developments. Within these conditions important new initiatives for engaging in development dialogue from the perspective of work and labour conditions – for convenience called “best practices” – have been undertaken from time to time in countries such as South Africa and Brazil, and have had strong national impacts, reaching far beyond the narrower domains of enterprise negotiations and specific collective bargaining routines. How sustainable are such innovations? Are other venues available which systematically may be explored as signposts for this so often weakened trade union movement? The next section will concentrate on these basic questions by examining, from a case study perspective, which fundamental changes in labour relations and industrial organization are taking place and the extent to which new challenges emerging from these new developments can be taken on by an, at times, seriously “eroded” trade union movement.

3. A post-structural adjustment perspective

Part of an innovative approach should also be a “best practice” methodology which, with an understanding of the wider regional economic and labour market realities, focuses on a precise macro-understanding of the changing labour relations patterns within a specific country. For instance, very few case studies have been published that cover a simultaneous analysis of changing labour relations in large-, medium- and small-scale enterprises. Yet, the impact of external factors on the labour situation must be fully understood before innovative “best practices” programmes may be initiated. For that purpose there is a need for ambitious innovative research that is commensurate with the complexities that follow restructuring.

In a recent study, Moonilal, a researcher with a personal trade union background, examined the future of trade unions in Trinidad and Tobago from the comprehensive perspective of changing labour relations. While studies on trade unions mainly take a political, sociological, or

¹⁵ A study visit on 27 January 1999 to the ISS (Institute of Social Studies) in The Hague by a delegation consisting of leaders of the CUT (*Central Unica dos Trabalhadores*) and the national association of universities, forming jointly the programme UNITRABALHO, yielded much information regarding an impressive joint venture by the Brazilian trade unions and social scientists – listed are some 500 faculty members belonging to more than seventy universities – to address numerous aspects relating to the recent dramatic worsening and weakening of the labour market situation in that country.

anthropological disciplinary focus, he concentrates on major changes in labour-management practices in large-, medium- and small-scale enterprises while taking the current, weakened, position of the once quite strong trade union movement in Trinidad and Tobago as a point of departure for analysis. Realistically, and somewhat cynically, with regard to the much good advice that is given to trade unions, he states that:

“Given the current adversarial model there is a limit to what can be achieved in the short term. In moving forward, the trade unions should be taken from where they are and not from where they should be (Moonilal, 1998, p. 309).”

The study is worth reporting for the following reasons. Firstly, Moonilal is one of the first persons certainly in the Caribbean region to explicitly locate the analysis in a post-structural adjustment perspective, implying a liberalized market model which exposes a small country to the competitive forces of the regional and global economy. A report on evolving labour relations in a privatized steel company is illustrative of privatization of public enterprises, a process which was undertaken under SAP from the late 1980s onwards. The record then is one of turning a loss-making unit with poor management practices, bad labour relations, and a strong trade union, into a profitable proposition within just a few years. In the process, advanced human management practices are applied with a profound impact on the organizational strength of the trade union. While the trade union continued its “adversarial style” management succeeded in gaining the loyalty of workers, maybe even in the longer term. Moonilal notices with concern:

“In an environment where business management has become more important than labour management, industrial reorganisation seems to be forcing the trade unions out of business. Even consultation diminishes, as was the case with safety and health issues.

So long as production is escalating and the company is making large profits, the union becomes less important. What is critical is employee loyalty, commitment and motivation. There is a real risk that the company can win the support of workers, leaving the union nothing more than a protest organisation. The company has been slowly breaking the back of the union.” (Moonilal, 1998).

“The tragedy for the trade union movement, and this is not an isolated instance, is that it is conditioned by outdated ideology, lack of confidence by its members, and by being ‘outflanked’ by multiple managerial strategies” (Moonilal, 1998, p. 152).

A second aspect which makes the study almost unique is an analysis that connects large-, medium-, and small-sized companies which traditionally have never or hardly ever formed a familiar operational territory for trade unions. Moonilal shows how, without exception, medium-sized companies are linked to large enterprises. These enterprises play a powerful role in the upswing post-structural adjustment economy with a labour force which, until a few years ago, was permanent and reasonably well unionized, and is now in essence becoming used to contract work only. A well-established professional workforce is thus under pressure to concede a weakening of the widest possible range of labour rights. Dodging of the minimum working wage and of other working conditions, and the new procedures regarding hiring and firing of contract workers, led to a situation for which Moonilal has coined the term *legal flexibility*, with firms increasingly trying to gain legal recognition for working relationships in which the principal employer has neither the responsibility nor the role of an employer (just as the worker is judged to be an independent contractor with few legal rights as an employee) since he does not set the rates of pay or conditions of work and the work process (Moonilal, 1998, p. 193).

The seriousness of the situation may be realised from the controversy as to whether contract workers (who do not count according to the law as “workers”) can take any legal action at all since ‘only persons defined as “workers” can take industrial action (Moonilal, 1998, p. 200). Most work is obviously found in the unregulated informal sector. Moonilal’s multimethod research of the rapidly expanding private security industry (PSI) reveals how large-scale organization of wholly unregulated work dominates an important segment ten per cent of the industrial labour

force that is hidden in the informal sector. In addition, the post-structural adjustment labour relations appear to have agreed to patterns of work that neither allow for organization nor for legal action, even as “workers”. Working conditions (pay and hours) are simply shocking, while women suffer even more than men due to labour market segmentation and sexual harassment.

The third, and main reason for reporting on this study is the great effort which Moonilal, himself a dedicated and leading trade unionist of the Trinidad labour movement, has made, in spite of all these adverse factors and trends, to outline what he calls a “relevant trade union approach”. It could well be that Moonilal, in so doing, has begun sketching one of the most realistic options available to the trade union movement, the more so if the objective is to sketch a future in which trade unions can play important roles as development institutions. He adds compellingly:

“..... or half-solutions such as simply asking unions to organize the unorganized and assuming that it is better to suffer the consequences of not fully understanding that the real reasons for the decline in trade union membership and power is that workers will continue to be short-changed as regards their desire for a decent wage, reasonable conditions at work, and meaningful participation in industrial life. Society as a whole is being robbed of a potentially influential institution which could effect change towards social and economic development. ... As we lack country- and industry-based data on the nature of union decline in specific labour markets we provide the wrong solutions. Internal governance and a friendlier legal framework would save the trade unions.” (Moonilal, 1998, p. 264).

What options are available for the future? First, in Moonilal’s view, unions that largely grew up in the public domain now need to respond wholeheartedly to the new future that is to be found largely in the private sector. Second, recognizing the many NGOs and action groups, mostly on the “protest stage”, trade unions “can now take on the role of a seasoned NGO, one that acts as a bridge between protest groups and their adversaries” (Moonilal, 1998, p. 292). Third, the most important challenge will be to renounce the old strategy of “confrontation and conflict” and become “vehicles for cooperation and co-determination” (Moonilal, 1998, p. 293).

One example of this is the obligation for trade unions to organize informal sector workers who are in desperate circumstances such as those experienced by security workers. Rather than opting for protest organization, the advice should be “to organize, but with an emphasis on playing a role in production while reserving the right to conflict” (Moonilal, 1998, p. 294). Education and training and human resource development are policy instruments for trade unions that are probably most effective in reducing the vulnerability of informal sector workers, while the unions possess a long standing record of providing such programmes. These programmes would have a number of advantages, ranging from reduced vulnerability and social exclusion to greater employability in other occupations.

What the HRD strategy implies is that trade unions need to adopt a more developmental role (proactive), rather than carrying out a strict bargaining function (reactive), in the process of industrial change (Moonilal, 1998, p. 300).

“Innovative communication strategies” and a “return to community unionism” form central elements in the adoption of true developmental roles by trade unions. In this section, emphasis has been placed on the fact that before new developmental roles can be adopted trade unions need to recognize the external causes responsible for the new forms of industrial organization and management labour practices. Among such developmental roles, in addition to the natural world of work, great emphasis is put on human resource development.

4. Institution building as “best practice”

In this section we would like to raise the issue of labour institutions and centres that are deeply rooted, yet independent, support institutions a “new practice” which the international trade union movement could keep in mind as a possible instrument for building links with NGOs and

civil society as a whole. Since a well-researched overview of the global “network” of such institutions is not available, we would like to refer to two cases with which we are familiar, in South Asia, i.e. the Pakistan Institute of Labour Education and Research (PILER), Karachi, Pakistan, and the Centre for Workers’ Management (CWM), New Delhi, India. The first example is that of a successful institution, the second of a failed initiative.¹⁶ Given the imminent hardships associated with privatization of public enterprises, the labour movement through these two independent institutions raised the issue of worker ownership of shares and co-determination in management. While in Pakistan the objective was to support any initiatives concerning public enterprises with worker involvement, in India the prime motive was to mobilize a number of large private sector industries, mostly of a “sick” nature, in order to restructure them to include ownership of shares by workers and also worker involvement in management, the latter in particular being intended to provide a model which might subsequently be applied in the wider process of privatization of public enterprises in India. The immediate circumstances of the trade union movement in both countries is grim. Let us briefly examine how in very difficult circumstances options considered as “best practices” have been experimented with and what lessons can be learned from these experiments.

4.1 India

In India, the origins of the trade union movement go back to the nineteenth century when, at an early stage of global industrialization, a working class emerged in the jute and cotton industries as well as in the rapidly expanding railway system, thus forming one of the outstanding chapters in global trade union history. However, a serious situation has recently arisen. In the public sector the required and ominous process of privatization threatens the job security of millions as downsizing on a huge scale is unavoidable. The private sector industrial relations scene has unfortunately been characterized by fierce battles over downsizing and flexibility, such as the well-known cases of Philips and Hindustan Lever in recent years. Rather than seeking positive gains both management and trade unions have generally adopted strong adversarial positions at the negotiating table, in the media, and also in enterprises themselves. Except for the highly publicized Self Employed Women’s Association (SEWA), little success has been noted in organizing workers in the booming small-scale enterprises as well as in other segments of the informal sector. In this situation, which appeared to be most risky for the expansion and, more importantly, the survival of the trade union movement, a number of labour leaders established a Centre for Workers Management (CWM) in the knowledge that a change of culture in the labour movement as well as at management level was required in order to overcome the adversarial culture of management labour relations. The central idea was to safeguard jobs in “sick” industries by general restructuring, and also by introducing modern management labour relations with participatory structures as well as a workers’ stake in ownership following the Employee Share Ownership Plan (ESOP) that has been practised, especially in the United States, with a positive impact on profitability and labour productivity.

Here a visionary plan was developed to practise the new pattern in a limited number of large private enterprises as a learning ground to be offered as a policy option to speed up the process of privatization of public enterprises. Some thirty firms “responded” to this initiative that was taken up by CWM with an initial involvement in Kamani Tubes Limited at Mumbai and Kamani Metals

¹⁶ It might be very advantageous if a complete inventory of such trusted, professional, experienced, independent labour centres were to be made available; such as DIEESE in Brazil, PET in Chile, and a limited number of similar institutions worldwide. The ILS could possibly play such a monitoring and mobilizing role in order to strengthen the global research capacity regarding labour and work related phenomena and policy issues.

Limited (with plants in Mumbai and Bangalore). The role of trade unions, through CWM, has been pivotal. The Supreme Court had ruled in favour of a labour movement initiative to transform Kamani Tubes, that had gone bankrupt due to mismanagement, into a workers' cooperative. Workers then raised a considerable sum of money to build a new financial asset structure. Leadership, rather than management, was provided by CWM in defending the enterprises' interests with respect to commercial banks, supervisory boards imposed by the Government of India, and courts of law.

Regrettably the economic and commercial situation from 1990 onwards became so serious that business failures and bankruptcies were once again prominent. Although the trade union leadership seriously misjudged its role and capabilities it should not be blamed exclusively for this. Painstaking research has shown how lack of conceptual clarity regarding all actors and institutions involved was at the root of so many problems. In particular, weak management, once more a problem in this unfortunate firm, gradually undermined any chance of success. However, a major lesson can be learnt from this experiment. At the earliest possible moment the Centre for Workers Management should have made full use of readily available advisory research material to examine the organizational, commercial, and legal implications of each individual company that responded positively to the idea of planning for the future. In addition, CWM should have played a high level monitoring and advisory role rather than becoming too deeply involved in remedying a situation which became out of hand when workers themselves began to lose confidence in the venture in which they had invested their limited savings.¹⁷

4.2 Pakistan

In Pakistan, decades of labour oppression have had a deep impact on the trade union movement as well as on the rapidly expanding NGO community in the country as a whole. The system of industrial relations basically fulfils the need for rapid industrialization with phenomenal profits for local as well as foreign businesses. While ensuring a secure and unhindered operation, this system is geared towards securing permanent subordination of the workers on the one hand and the removal of conflicts from the workplace, including those likely to develop into class conflicts, on the other. To this end, the system seeks to turn the unions, whenever and wherever possible, into instruments for disciplining the workers (Thomas, 1995, p. 87). However, the emergence, "even if in small numbers, of an enthusiastic, energetic and eager-to-learn layer of shopfloor unionists over the past few years" may be seen as a silver lining (Amjad Ali, 1995, p. 94). One remarkable development has been the establishment of the Pakistan Institute for Labour Education and Research (PILER) in Karachi. This institute, which was established in the early 1980s, succeeded in both receiving a broad endorsement by the highly segmented trade unions and also serving the trade union movement as a national platform for raising issues such as those of the peace movement and of human rights. PILER provides on the one hand an elaborate programme of short courses and training programmes for union cadres, while on the other it takes up advocacy roles together with NGOs and civic organizations. During the past decade, and here we should mention PILER's charismatic leader, Karamat Ali, a major role has been played in the creation of a confederation of the scattered trade union movement. One of the developmental issues has been "child labour" a social problem very deeply rooted in the entire sub-continent. In Karachi alone more than a dozen centres have been established in the very communities where these children live to provide medical care and some education after working hours. In addition, research on child labour and involvement by psychologists are two examples of the size of the programme. By astute

¹⁷ See Mody G.; Mani M.; and Ramaswamy, E.A. (1998) for a Project Conclusion Report.

use of the media, the organization of high profile events such as a children's march or an exhibition in which children are at work in makeshift workshops, the trade union movement, through PILER, has succeeded in putting child labour on the national agenda of broad social concerns.

Once again, the lessons are precise and revealing. Endorsement by the trade unions, although independent, has certainly formed an important factor in the sometimes slow but always sure institutional strengthening of PILER. For example, over the past decade, the issue of worker involvement in privatization of public enterprises in this country has been taken on as a challenge. Some modest results have been noted, particularly in the national tractor industry where, in accordance with ideas inspired by the "ESOP" model and the "Mondragon cooperative" model, a few small but significant steps have been taken. These steps are significant in that they show a clear deviation from the usual privatization process in which workers do not play any active role.¹⁸ In spite of the pressure of work concerning tasks as diverse as education programmes, court case involvement, and programmes for women, sufficient attention has been given to institution building in which the solidarity of the international trade union movement has played a role as crucial as that of the high standard of leadership of the institution. In addition, the coalition with Non-Governmental Organizations, also represented on its Executive Board, and the tackling of major issues that reach far beyond the traditional trade union agenda, have done much to strengthen this small institution, the impact it has, and the future role it hopefully can play in trade union affairs.

5. Strategic areas as "best practice"

A fourth aspect of this reflection on "best practices" for trade unions regards a selection of a number of key issues. Themes such as women and work, working conditions in small and micro enterprises, conditions of migratory workers, and child labour appear to fall well within the confines of trade unions. Yet these themes also are, or should be, issues of concern from a national developmental perspective. Within the limits of this paper we have selected the theme of "women and work" for closer analysis from a trade union perspective.

5.1 Women, trade unions and development

Many years had passed before feminist scholars and activists succeeded in convincing the "development community" how seriously it had failed women by not taking fully into account the multiple roles which they play in development.¹⁹ Currently, the central role for women to define and foster development is high on the development agenda.²⁰ It is in particular through the Human Development Reports by UNDP, specifically the path-breaking 1995 edition, that widely read feminist literature has gained legitimacy in the development debate. The Gender-Related

¹⁸ The best example is a tractor manufacturing firm, Millat Tractors of Lahore, that has established a number of participatory committees and also, as a result of privatization, allocated a small percentage of its shares to its workers. For an outline of this development refer to both Pakistan and India, H.Thomas (1998).

¹⁹ We may refer to Boserup (1970) and Sen and Crown (1987) as classic works to be found amidst a vast array of feminist literature. Noeleen Heyzer (1988) wrote a pioneering feminist study with a focus on women workers. An excellent and more recent review is contained in Nandita Shah *et al.* (1994). Special mention should also be made of the manner in which the ICFTU has placed female literature on its research and policy agenda. See background papers and policy statements produced on the occasion of the 5th World Women's Conference, Ottawa, Canada, 1991.

²⁰ See UNDP Annual Report for 1995 and also for 1998 for the importance of "gender issues" in current development thinking.

Development Index (GDI) and the Gender Empowerment Index (GEM) have become well-known concepts in development debates. In addition to the HDI ranking, many countries have also become sensitive to their GDI and GEM ranking on development scales. Empowerment certainly includes the world of work, working conditions and earnings levels (Young, 1993, pp. 157-158) in which women generally are among the most vulnerable categories. Women's contributions to agriculture, industry, services, and household work have been made "visible" to the extent that staggering additions had to be made to the national accounts as made in traditional ways (UNDP, 1995). Also, women's multiple roles in productive and reproductive work as well as in the community point to workloads extending far beyond the traditional idea of work and labour statistics.

Certainly the trade union movement is fully aware of shortcomings when addressing the needs of women as well as enrolling them in the trade union movement. Successes of women's organization such as SEWA (India) and BRAC (Bangladesh), in addition to the numerous examples of women's organizations in the farming sector, informal production, and export promotion zones, are well documented (see CNV/FNV, 1994).

It appears as if a complete transformation of trade union culture and organization is needed in many countries before trade unions can fulfil their role as a development partner by improving the status of women. The long time needed to achieve such a transformation was highlighted in a conference held in Amsterdam in 1997 in which note was taken of elements that could possibly contribute to success in this respect.²¹ Knowledge of achievements and sustainability in strengthening the role of women in the trade union movement and also as development partners is still widely dispersed. A fascinating report has been published by the Indian Society of Labour Economics in which, alongside aspects of organizing women workers, two sections are devoted to the urban disorganized and the rural disorganized (R. Datt, 1997).²² In her analysis of attempts to improve the situation of disorganized women, Uma Ramaswamy notes certain common aspects found among dozens of cases. Close cooperation between unions and NGOs, establishment of cooperatives, and infrastructure development form common elements with the possibility that "convergence in perspectives of union struggles and NGOs could provide platforms for their coming together" (R. Datt, 1997, p. 170). Ramaswamy shows the necessity for a sector-specific approach. The situation differs greatly in the following large labour market areas where women work in great numbers: agriculture, fisheries, construction, self-employment and home-based work. Skill formation, strengthening of networks, and provision of credit are among the policies promised to be introduced to reduce the burdens carried by women. Ramaswamy, however, is concerned that the deep gulf between women and the trade unions will be very difficult to bridge and states:

Although women are well represented, grass-roots experience and micro level studies reveal trends in gender issues which are reminiscent of trends within unions in the formal sector. While women activists are known to have been in the forefront of many struggles, their growth within unions tends to be truncated. Time and again women activists reveal that patriarchal implacability within unions and the household nature of organisation restricts women from moving into more roles of authority (Uma Ramaswamy, 1998, p. 186).

²¹ Such listings include the following: development of women leaders, research, sensitizing of union leaders and members; setting of objectives, identifying new bargaining issues, and strengthening community involvement (FNV/CNV, 1997, pp. 24-30).

²² Over the years the Indian Society of Labour Economics has developed as one of the strongest national networks on labour studies. It has provided an outlet for numerous innovative studies on new labour-related themes. See *The Indian Journal of Labour Economics*, July/September 1998.

The same study reports on the establishment of many makeshift unions formed by activists in the disorganized sector, often as the result of conflict in small-scale enterprises. If the court system is not prepared to legitimize such initiatives there is no hope whatsoever. Dozens of these impromptu initiatives are now beginning to create new forms of trade union organization taking root in the “informal sector” itself. How can the traditional trade union movement respond to these challenges? Niva Chandra argues that:

“... a lateral shift has to occur in such a way as to ensure that accumulated union resources are transmitted to different areas of conflict. This can be achieved through conflict over forms of organisation in the traditional unions and organising the disorganized in different space with the requisite forms based on the collectivist logic. This approach will enable the eventual transmission of the resources of one sector to those of another, thus increasing the solidarity of the working class. It is the dialectic of this dual approach that will enable the union movement to transcend the present impasse where the entirely unionised workforce fails to rise above 0.3 per cent (30 per cent of 10 per cent) of the workers.” (Chandra, 1997, p. 46).

The question may be raised as to whether Chandra hasn't indicated somewhat gratuitously one of the options for trade unions to counter the current adverse trends. Can trade unions really take on migratory workers, child workers, and workers in small-scale enterprises in addition to the aspects related to women's work that were introduced above?²³

6. Concluding observations

The labour movement may be characterized by its strong national, sectoral, regional and global institutional framework. Yet, there are many reasons for concern about the adverse trends referred to in this paper. Given the current revival of interest in the development of adequate institutions to overcome, for instance, the financial and governmental crises that lie at the root of the economic recession which has hit major parts of the developing world so forcefully, it appears that the labour movement has at least an institutional base to start with. A reexamination of institutional requirements may well be one of the highest priorities on the agenda of the international trade union movement. In this paper it was shown with case studies from Pakistan and India that the roles of such institutions need to be defined very precisely in order to avoid any counterproductive effects.

When trade unions in the formal sector are declining in so many countries while formidable tasks are reemerging in the remaining labour markets, the creation of special institutions may be an important “best practice” for the future.²⁴ It is hard to imagine that trade unions which have developed in a different era with a different enterprise culture – i.e. that of large and often public enterprises – would suddenly be capable of undertaking new tasks in the informal sector.

New developments in global labour markets may require a better monitoring and analysis of migratory flows of hundreds of thousands of mostly very vulnerable workers for which, at the ICFTU and ILS/ILO levels, special institutional attention may be needed. Also, in a sub-continental perspective, in addition to regionalization of major economic blocs there are new

²³ Each of these themes is covered in a wide range of literature, experiences and activities which obviously could not be summarized in a paper by one author. I would just like to list a few publications that may assist further reflection: on migration - Stephen Castles and Mark J. Miller, (1998); on migratory domestic workers - Noeleen Heyzer, Geertje Lycklama Nijholt and Nedra Weerakoon (1994), and on child work - Ben White and Indrasari Tjandraningsih (1998).

²⁴ See van der Geest and van der Hoeven (forthcoming 1999). Kochan (1986) provides a stimulating guideline in this respect with emphasis on the role which the ILS may play; this, in my view, is even more the case when one extends the research to include “non” industrialized countries.

labour market patterns that can only be monitored and “supported” by well-equipped regional institutions. The establishment of labour market monitoring institutions is another aspect of institutional development that calls for urgent attention in most countries. Perhaps even more institutions are missing at the sub-national level, since the current process of industrialization is characterized to a great extent by meso-level economic development with clustering and networking of enterprises and local institutions. Many variations of the Third Italy model are to be observed in developing countries.²⁵

Clearly the international labour movement, thanks to its “global” institutions, its sector-oriented trade secretariats, and continental offices, already has an institutional base to start with. Yet there is much scope for reassessment in the face of the overwhelming challenges. Thus, it may be worthwhile reexamining the new requirements of economic restructuring and transformation of labour markets in order to equip and renovate the institutional network where gaps are found.

Such action may be crucial since the mainstream development community tends at best to ignore “labour institutions”. When comparing, for instance, the views of the World Bank (and the IMF), the UNDP and the ILO, one is struck by the emphasis placed on the efficient functioning of labour markets and on the need for flexibility in the World Bank approach, the relative absence of a focus on issues of work and employment in the UNDP methodology, and the great emphasis placed by the ILO on industrial relations patterns, collective bargaining and institutional aspects of labour market developments (World Bank, 1995; UNDP, 1996, 1997, 1998; and ILO, 1997).²⁶

The trade union movement in “donor” countries may well be one of the strategic partners to address the complex issues that have been raised. Through special programmes, institutional building with an emphasis on training and education and on aspects of strengthening trade unions in their roles of protecting labour rights has been the main activity of many projects of international development cooperation. However, a larger dialogue agenda within the national context may be of critical importance in bringing issues of employment, work, and labour conditions into mainstream policy discussions. Whenever foreign investments are encouraged implemented agricultural programmes and/or small and micro enterprise programmes are automatically created and are mostly hidden. There are environmental as well as vital labour issues at stake which tend to be overlooked.

A comparative research effort to ascertain the developmental involvement by donor trade unions may enhance the collective impact by designing “best practices” strategies.²⁷ In this paper we have argued in favour of an innovative approach to the introduction of new policies. An approach would build on the achievements of traditional “conflict” theory and industrial relations traditions, yet extend beyond its confines by exploring less adversarial strategies and by reaching out to the informal sector and casual labour. First, an in-depth analysis of labour market realities and trends at regional, national, and sub-national levels is called for in order to obtain a realistic insight into a number of factors that all too often have been ignored in more traditional approaches. Second, it is important to examine changing patterns of labour relations in various sized enterprises and firms and understand the relationships that emerge in a post-structural adjustment era. Third, it is necessary to reflect on the role which support institutions may play as

²⁵ In “small-scale” enterprise literature, in particular, much attention is given to these huge clusters of small-scale enterprises that concentrate on specific cities and their immediate surroundings.

²⁶ A recent paper by Ranis and Stewart (1998) shows how it is quite possible to combine, in a balanced manner, macroeconomic measures with meso-level policies so as to aim at a “pro-human development adjustment” to address the current crisis.

²⁷ One may refer to the excellent role that ICFTU has played in coordinating assistance to COSATU for so many years as well as to its mobilizing role with respect to numerous development themes.

well as on the strategic importance of a number of themes, such as the role of women in the trade union movement. In addition, coalitions with the international NGO movement may be auspicious and also prove to be very effective from several points of view.²⁸

In this paper an attempt has been made to sketch feasible post-structural adjustment scenarios for trade unions which are facing great difficulties in many countries, and even in certain regions. The challenges appear overwhelming with so many adverse trends and major uncertainties. The prospect of flexible, lean work in a world which is now entering the information age is daunting. For instance, the “network enterprise”, with all its ramifications, suggests a shift away from well-known patterns of industrial organization towards “a comparative model able to give simultaneous explanations of technology sharing, the interdependence of the economy, and the variation of history in the determination of an employment structure spread across national boundaries” (Castells, 1996, Vol. 1, p. 231). All the more reason to address the challenges faced by trade unions in the context of development and profound structural transformation with a clear strategy of approach and method.

It is only in exceptional situations, such as that of COSATU in South Africa or CUT in Brazil, that the trade union movement has succeeded in playing a role in development as a whole. The key concern will mainly be to survive under adverse conditions and to care for members directly. Yet, it is hard to imagine that labour and trade unions, in the decades to come, will not be an indispensable aspect of social and environmental sustainability; not as an additional problem, but as part of the myriad of solutions that are called for.²⁹

²⁸ A recent agreement between FNV (The Netherlands), NOVIB and Foundation De Zaaier (two Dutch NGOs) to form a “Friends of PILER (Pakistan)” consortium is an example of such possibilities. A major spin-off is that the labour institution concerned also receives international support for the way in which it participated in the national peace movement.

²⁹ At this point I would like to express thanks for insights gained from an exchange with Hagen-Koo, University of Hawaii, while I was staying at NIAS, Wassenaar, The Netherlands, for a sabbatical year.

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