

The research process as tool

The petroleum industry has seen an increase in the amount of restructuring lately. This can be attributed, in part, to the actual and potential deregulation of the industry. CEPPWAWU organisers found that they were responding to the restructuring on a case-by-case basis – the union did not have a coherent strategy for the sector, so it decided to research the industry to gather information to develop a proactive response.

CEPPWAWU chose the labour service organisation, TURP (the Trade Union Research Project), to do the research. It received funds from the South African Labour Development Trust. However, this was not run-of-the-mill research. In contrast to the usual scene of guerilla researchers or consultants who come in, do the research and leave, TURP and CEPPWAWU used this research process to empower union members and build organisation. This article explores how they went about it.

Research aims

Sakhiwo Zako, CEPPWAWU's petroleum co-ordinator, identifies the union's main aim with this research: 'We wanted to gather information to ensure that union policy on the industry would not be based only on ideology, but also fact.' Another aim was to enable the union to anticipate what employers are going to do. 'Unions

Etienne Vlok examines how the research method used in the CEPPWAWU/TURP petroleum industrial restructuring audit empowered shopstewards and built organisation.

usually just react to companies. We want our own broad restructuring policy.'

The chairperson of the petroleum shopstewards council, Musa Bhengu, elaborates: 'In the past, we used to respond to restructuring in general without evaluating the nature of the specific industry we were dealing with. This research will allow us to understand this industry and employers' motivation when restructuring. It will place worker leaders who engage in restructuring on an equal footing with management.'

Gary Phillips, TURP's researcher, and David Jarvis, TURP's research co-ordinator, explain that 'the research sought to map company changes and see what possible changes lay ahead'. Another objective was to develop a clear understanding of the nature of workplace restructuring in the petroleum sector.

But TURP and CEPPWAWU wanted to do more than just research. They also wanted to arm negotiators at sector- and

Nedlac-level when tackling restructuring issues. The organisations also wanted union shopstewards and organisers to understand the global and national context within which the changes at their plants and companies were happening.

More than research

TURP was inspired by the Technology Adjustment Research Programme (TARP) of the Canadian Labour Congress of 1995. According to Phillips and Jarvis, 'TARP developed teams of worker researchers to investigate technological change at their plants. These teams then wrote reports.' CEPPWAWU and TURP used this idea and came up with a project that, at its foundation, aimed to have shopstewards playing a leading role in the research.

They decided on these research methods as it is the best way to strengthen labour and ensure research methods build capacity. They will also publish accessible booklets to spread the information from the audit amongst CEPPWAWU members. Phillips and Jarvis continue: 'We feel it is important that unions own the research they commission. To ensure this you have to give control of the process to them. We also believe that research owned by the unions has more of a chance of being used. This method contributes to the unions' goal of worker control.'

This research process built CEPPWAWU as an organisation by providing a large number of people with knowledge of the industry. Bhengu believes this minimises the reliance the union has on individuals and, so, builds the union. This process also strengthened the union as it showed it how to monitor and evaluate future research.

The shopstewards' role

The role of shopstewards was key to the research process. CEPPWAWU and TURP recognise that shopstewards are the eyes

and ears of the workers. Zako points out that restructuring happens at the workplace, which is far away from the unions. Shopstewards have to be continually 'researching' their companies and, as Phillips and Jarvis point out, brainstorming on restructuring information and asking management questions.

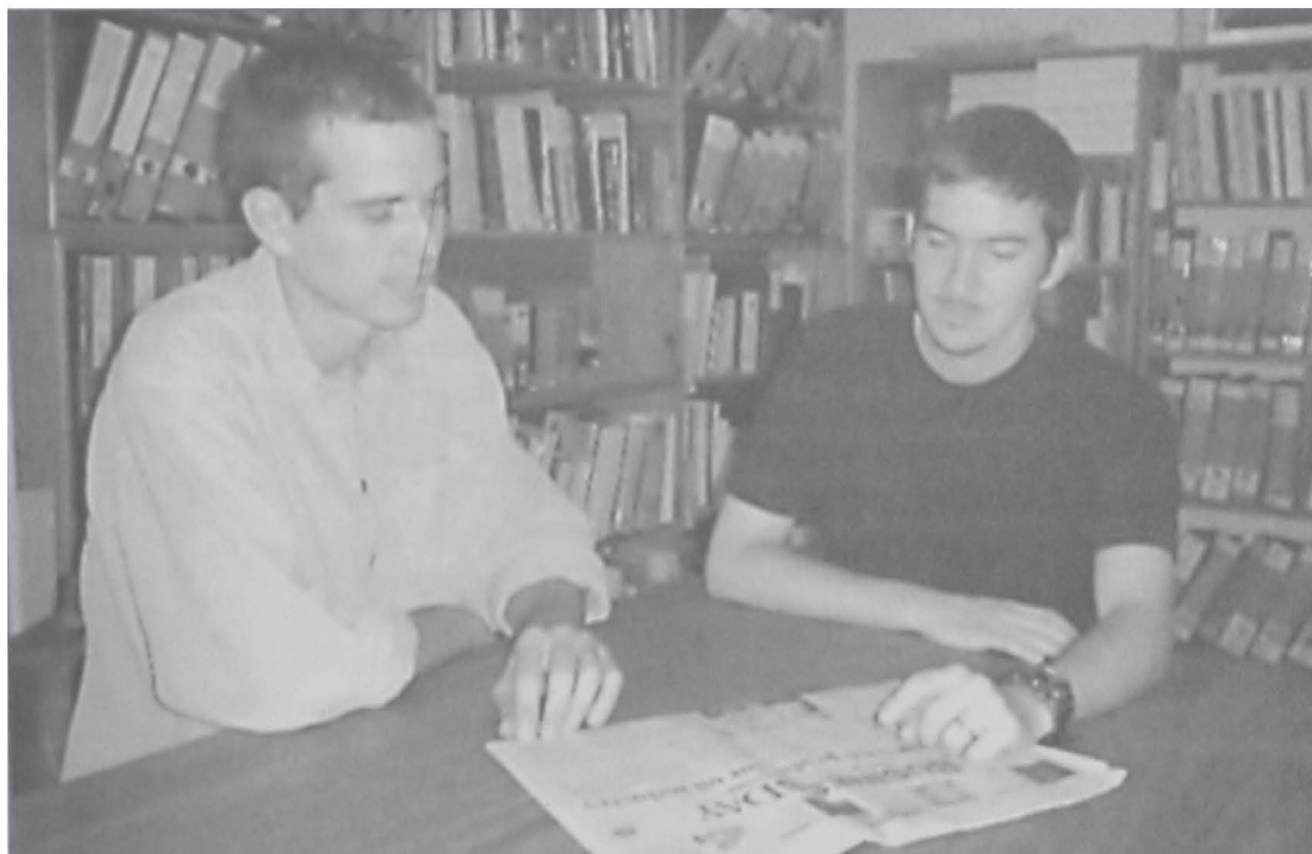
The research started with five regional workshops where CEPPWAWU's industrial restructuring co-ordinator and the petroleum co-ordinator introduced the shopstewards to TURP, made them aware of the research and trained them on restructuring. CEPPWAWU also trained the shopstewards in basic research and writing skills.

The shopstewards joined the TURP researchers on interviews with the company managers. They verified the information received from management. The shopstewards were also encouraged to do their own research with questionnaires provided to them.

The shopstewards were also involved at the end of the process. The last draft of the research was presented to the petroleum shopsteward council. They pointed out what had been left out and how the findings can be linked to the union's strategies. They have also established a task group to develop a restructuring approach.

Empowering shopstewards

Phillips and Jarvis regard the workshops as useful because the shopstewards became part of the process, were trusting of TURP, prepared information on their companies and assisted with access for the researchers. 'They were participants in the research, not subjects of the research. Some even prepared documents in advance of the researchers arriving at the companies - something they would not



Pic: Lea Fushare

Gary Phillips and David Jarvis from TURP.

have done if they had not attended the workshop and been briefed as to the importance of the project.'

Zako and Bhengu agree that this research empowered shopstewards to understand the global nature of the industry and ownership structures, and the implications these have for management.

Zako expands: 'Petroleum is a dynamic industry because of the different multinational corporations with their different strategies. We wanted shopstewards to understand the industry, observe processes at their companies and predict what may happen. Shopstewards also had to write about restructuring in their companies. With this research we sharpened the shopstewards' skills to use the information at their companies.'

Bhengu feels that a better understanding of the industry might help workers build solidarity instead of competing. 'Shopstewards at Shell can tell

those at Engen what is happening,' adds Zako.

By including the shopstewards in the process, CEPPWAWU and TURP ensured that issues were not left out – something that could have happened if only a few were driving the process. Bhengu says it also ensures that the final report is understood by more. Hence it will be used by more shopstewards when confronting restructuring.

Bhengu, who is a shopsteward at Caltex, confirms that the shopstewards were empowered by participating in the process. 'Now we will be keen to observe management's moves and anticipate the consequences of it on workers' lives.'

The reference group

A reference group was used to ensure that the research was union-led. The group, consisting of three shopstewards and two officials, led the research and gave political direction. The group met five times during

the research. Phillips and Jarvis explain: '[It met] first, before the research, to ratify the sample, the questionnaires and the nature of the research. It met three times during the research to monitor and assist where necessary and give direction. It met again after the research to discuss the results and the final report before it went through the union structures.'

The group:

- ☐ gave clarity to the researchers when needed;
- ☐ helped with the construction of the questionnaires;
- ☐ ensured the language was accessible for workers;
- ☐ checked whether the researchers had spoken to the right people;
- ☐ ensured the information was adequate;
- ☐ helped solve problems when they arose.

Worker control was also ensured as TURP was in weekly contact with the shopsteward council's chairperson. Phillips and Jarvis feel that the CEPPWAWU officials also operated in a way that gave the shopstewards the leading role.

TURP gave an interim report to the KwaZulu-Natal shopstewards council and again had the final report examined by the national shopstewards' council. For Bhengu, the shopstewards' council also acted as a quality control mechanism. This happened when it vigorously questioned the reliability of the report and got clarification on issues that were not clear in workers' language. 'We will ensure that this project yields good information by having a debate on the information,' promised Bhengu.

Success

'In my view the research was successful,' declares Bhengu. 'It developed an understanding amongst the shopstewards

that their employer's actions are influenced by externalities such as the Energy Policy or tariff reduction.'

Zako also regards the research as successful because the union will understand what is happening in the industry. 'We had feedback workshops where workers confirmed the findings.' He also sees it as successful as the research served as an educational process for the shopstewards - shopstewards gained information and skills.

'It was also successful,' continues Zako, 'as CEPPWAWU will now not have to wait on information from the companies when engaging in this industry. TURP helped us build organisation and see the consequences of restructuring. They did not necessarily come with solutions. We still have to get those.'

TURP believes, in terms of process, that the project was largely successful. Phillips and Jarvis claim that: 'The reference group played a tight co-ordinating role and controlled the process. We are excited with the results and believe the report is relevant to the union's needs.'

TURP's role

CEPPWAWU chose TURP because it has worked with the labour movement for some time, providing intellectual and research solutions. Zako states that TURP took the needs of the union into account and thus 'we will not have to do the research over again, as it gave us relevant information. TURP's work is people-centred, unlike consultants.'

TURP is also highly regarded by Bhengu who describes it as labour-friendly. 'They are academics who are prepared to listen to ordinary people and assist with their needs. They present possibilities that can be attained.'

TURP had previously raised the idea of such research with a few unions but it was



The petroleum restructuring audit will strengthen the union's position in negotiations.

CEPPWAWU (then CWIU) who liked it. Phillips and Jarvis say that this union had the capacity and saw the value of such a project. The union was able to do such a research project as it had employed a restructuring co-ordinator who could focus solely on restructuring issues and give a large amount of time to the project.

The advantages

Phillips and Jarvis are adamant that this way of doing research overcame many problems that researchers usually face. They cite some examples: 'Access to plants' was secured because this was a union project. The companies were obliged to allow us to interview their managers. Also, because the research was in the union's name, the workers were on board. Finally, the union did not have to be convinced of

the results because they participated in the research.'

Lessons

For CEPPWAWU this research was not ideologically biased – it was a fact-finding mission. Zako says that if the union does research by itself, the results could be biased. Because this project interviewed both managers and workers, the results were very useful for the union. This project also allowed workers to express their own views, not just that of the union. Zako explains: 'For instance, the union is against teamwork, but some of our members work in an environment where there are teams. They then have to participate. We learnt that we can have strong policies, but if teams exist we must change our actual policies to control it.'

Because the union gathered more

information about teams, Bengu says 'it has reopened the debate on team participation. This research has exposed a number of areas where the union needs to tailor its policies to fit in with the new environment.' Bhengu believes the main lesson CEPPWAWU learnt from this is that research is more relevant if it is participatory.

Suggestions

Zako suggests that before a union does research it must decide what it wants and what it is responding to. 'You cannot respond to broad political statements, only to specifics. This case is for a specific industry where restructuring is taking place.'

Zako also suggests that other unions involve workers in the research process whatever the cost. 'Involve the very people who you advocate to represent and let them be the custodians. Let those who come from the area of research write up the questions. But allow workers to be critical. After all, they are at the coalface.'

'Unions should democratise the process,' adds Zako, 'by ensuring it is not only a head office thing, whatever the costs. Establish a reference group who can interact with the researchers. Let the national shopstewards' council be a consultative group. Present drafts to them.'

'If the researchers only report back to the national office bearers, only they will ever understand it. However, if they report back to the objects of the research - that is the shopstewards - that will help. Research should not belong to the political leaders. It must be independent and not be scared of raising our shortcomings. The union can then make an informed decision,' concludes Zako.

This process provides a few lessons that Bhengu feels other unions and Labour Service Organisations (LSOs) can learn: "

□ broaden the process to involve the

workers as they have more up-to-date information than other ways of collecting data;

□ ensure management views are part of the process as it will enable the union to anticipate likely resistance from management;

□ involve the workers in the reference group.

Projects such as this which emphasise shopsteward participation and worker control are time consuming and rely on having enough of a budget to cope with the demands. Phillips and Jarvis feel that it is also vital to have people in the union who are able to dedicate time, energy and leadership. To LSOs they suggest that they be prepared to work with the rhythm, and within the goals, of the union.

For Bhengu, the LSO's contribution includes charging a reasonable price for such a project. The LSO, when helping the union develop a policy, should ensure that it also builds research-capacity in the union.

Shopsteward consultants

So often consultants are roped in when research on an industry or company needs to be done. This project has shown that the most qualified experts on an industry are the workers. Few people know the industry and its problems better than those who work in it everyday. Not only has it resulted in TURP providing better research results, but it has empowered a whole range of shopstewards. By doing this, CEPPWAWU has also been strengthened. It is now blessed with a new string of leaders who have new skills and expertise to add to their existing knowledge.

TURP was successful with this project because it gave control of the project to the union. Its agenda was to service the union, not to compile academic reports. By doing this it was truly a labour *service* organisation. ★