



NUMSA ORGANIZING STRATEGY CONFERENCE

RANDBURG - JOHANNESBURG

DATE : 23rd - 25th November 2011



NATIONAL UNION OF METALWORKERS OF SOUTH AFRICA NUMSA

153 Bree Street (Cnr. Gerard Sekoto Street)
Newtown
Johannesburg
2001
letichai@numsa.org.za; alexm@numsa.org.za; alexmashilo.numsha@gmail.com
Organising, Campaigns and Collective Bargaining Department

Organising, Campaigns and Collective Bargaining Strategy

This document is titled Numsa Organising, Campaigns and Collective Bargaining Strategy. It is also referred to as OCCB Strategy or simply Organising Strategy. The first draft was circulated in 2010 following the National Organising Strategy Workshop. The second draft was presented to the Mid-year 2011 Central Committee. This is Third Draft. This draft takes into account recent developments and some of the lessons drawn from the visit to Canada by the GS, OCCB HOD, National Motor Sector Coordinator and National Engineering Sector Coordinator. We use the phrase "some of the lessons" because two reports concerning experiences from the North American visit are available.

TABLE OF CONTENTS

Page	Sec	Content Title
3	1	Background and context
3	1.1.	Revolutionaries must constantly study change move with times
3	1.2.	Numsa's scope of organising
5	1.3.	Collective bargaining landscape dynamics
7	1.4.	Collective bargaining and changes in the structure of industry
9	2	Organising, campaigns and collective bargaining strategy, a guide to action
10	2.1.	Growing the union: membership recruitment and sustenance, unionisation, organising and campaigns, our strategy
11	2.2.	Campaigns, striking the balance between shop floor and macro issues
12	2.3.	OCCB system, structure and machinery
14	3.	Collective Bargaining
14	3.1.	Strategy
15	3.2.	A new, but transitional collective bargaining landscape towards centralised bargaining
17	3.3.	Dispute resolution under centralised collective bargaining and pillars of wage policy
21	3.4.	Direct wage increase demands during frequent collective bargaining rounds.
22	3.5.	Short- and long-term agreements
24	4	Capacity building
24	4.1.	Education and training for OCCB operations
26	4.2.	Resourcing and resources including human resources (staff) and material resources such as budget and technology
26	4.3.	Model Agreements (MAs), Guidelines and Standard Operating Procedures (SOPs)
27	5	The geography of locals
28	6	Linking workplace and community struggles
28	7	International solidarity

1. BACKGROUND AND CONTEXT

1.1. Revolutionaries must constantly study change and move with times

- a. There is an important guide available in the Chinese Communist Party's constitution which underpins one of the central motivations to this strategy. That is, revolutionaries, and by extension their organisations, must:
 - emancipate the mind, proceed from reality in handling all matters;
 - seek truth from facts, develop and verify the truth through practice;
 - integrate theory with practice;
 - explore new ways, boldly experiment with new methods, go in for innovation and work creatively;
 - constantly study new situations and keep pace with times; and
 - review new experiences and solve new problems.
- b. That is the direction we seek to take through this strategy by which we also seek to:
 - improve the effectiveness and efficiency of OCCB operations;
 - grow the union strength quantitatively by increasing membership in all sub-sectors, and qualitatively through capacity building and developing members into active unionists in terms of activity, class and solidarity consciousnesses in workplace and community struggles according to their connection;
 - advance workplace *democratisation*, assert *worker control*, increase workers' share and *claim the value that they produce* from production.
- c. Because this is a strategy, a guide to action, we do not seek to dwell on tactical details relating to organising, campaigns and collective bargaining. That we leave largely to what Lenin called a *concrete analysis of concrete conditions*. We believe that a constant *concrete analysis of concrete conditions* must be conducted and inform adjustment in tactics. By their very nature tactics must be flexible to changing reality.

1.2. Numsa's scope of organising and membership quantitative dynamics

- a. NumSA's scope of organising includes iron, steel, engineering and metallurgical industries; electrical engineering industry; electrical contracting/construction industry; lift and escalator industry; locksmith trade; plastics industry; automotive manufacturing industry; automotive manufacturing and motor industry; tyre and rubber manufacturing industry; battery manufacturing industry; scrap metal industry; base and precious metal smelting industry; and related industries, all of which are called metal and related industries.
- b. The union is the largest in the metal, engineering and related industries in South Africa. But its membership growth has, for various reasons, been in the state of some sort of stagnation because of job losses and resignations despite gaining new members. NumSA's membership is predominantly blue

collar for historical reasons. Previous efforts to move into the white collar category have, while making some progress in some instances, not reached a breakthrough. For this there are various reasons which include the legacies of Colonisation of Special Type (CST) and apartheid.

- c. The workplace, given CST and apartheid is largely forming a pyramid where Black workers are concentrated at the bottom and White workers dominate the top. To the extent the transformation agenda for a non-racial, non-sexist, democratic and prosperous society, which Numsa embraces and which is driven by such other pieces of legislation as the Employment Equity Act (EEA) and the Skills Development Act (SDA), is not accepted at the top of the workplace pyramid those who dominate it have a tendency not to regard the union as a vehicle for their interests.
- d. But Numsa cannot abandon the agenda of building a non-racial, non-sexist, democratic society inclusive of the workplace because of the legacy of racist attitudes. In fact, to the contrary, it is part of the essential content of our strategy to defeat racism and sexism in all their manifestations. We want prosperity for all members of the working class without regard to race, sex, other arbitrary grounds and unfair discrimination in our scope of organising and beyond.
- e. Numsa has strong presence and is the only union among the hourly workforce in all Original Equipment Manufacturers (OEMs), truck and bus assembly plants, in the automotive assembly industry. The same applies in the new tyre and rubber manufacturing industry with some one or two exceptions of plants where another union exists but with numerically weaker membership to Numsa.
- f. But there are large numbers of non-union members as well. This is especially prevalent in the metal and engineering industries sector, electrical contracting or construction sector, and what we called the motor industry – a sector comprising of motor components manufacturing, vehicle body building, filling stations or garages, motor services and retail.
- g. Numsa is not the only union that is organising in the metal and engineering industries sector and in the motor sector. But the total density of union members in the metal and engineering industries sector is hovering round 50 percent of the total workforce while in the motor industry sector the total density of union members is, in stringent terms, struggling against representativeness.
- h. In the Information, Communication, Electronics and related Technology (ICET) sector Numsa was removed from the Sector Education and Training Authority (SETA). The reason was decline in membership to the extent the union lost threshold. Associated with the union's membership decline in ICET sector was a process of de-industrialisation which meant many jobs were destroyed.

- i. The union is numerically weak in membership or visually non-existent in the electrical construction sector. There is a rival union that has targeted this sector as its base and haven against the principle of one industry one union and against worker unity.
- j. In the Iron, Steel and Basic Metals (IS&BM) manufacturing sector – what in collective bargaining terms has gradually drifted from the principle of centralised bargaining to what is called House Agreements (HAs) – Numsa co-exists along with other unions. The situation is the same at Eskom where, Numsa is the numerically weaker of the other unions for historical reasons.
- k. *From the above it is clear that the central pillar of union organising must be making members, i.e. recruitment, and membership sustenance through quality service.*

1.3. Collective bargaining landscape dynamics

- a. Numsa has a mixed collective bargaining model in terms of landscape. This comprises of plant-level, company-level and sector-level collective bargaining.
- b. Companies with which company- and plant-level collective bargaining is conducted are demarcated or categorised into “Basic Conditions of Employment Act (BCEA) companies”, “HAs companies” which are located mainly in the IS&BM manufacturing sector, and includes Denel – State Owned Enterprise (SOE) that specialises in arms manufacturing, related aviation and electronics, and Eskom – SOE that specialises in electricity generation, transmission and distribution.
- c. There is a difference between plant-level and company-level collective bargaining.
- d. Company-level collective bargaining is a collective bargaining between the union and a company in terms of which the collective bargaining agreement is applicable to the rest of the company, in other words, has a company-wide scope, regardless of the number of plants that company has.
- e. Plant-level collective bargaining may or may not be company-level collective bargaining depending on the number of plants that a company has. If a company has one plant, then company-level and plant-level bargaining means one and the same thing. But if a company has more than one plant and the union conducts collective bargaining at each one of those plants then that is plant-level collective bargaining but not at the same time company-level collective bargaining. This is rife in the BCEA companies sector. To some extent it is also the case in the motor industry sector. Plant-level collective bargaining is, as such, more problematic than company-level collective bargaining. This does not mean that company-level collective bargaining is not problematic.

- f. In the automotive industry, tyre manufacturing industry, motor industry sector, and metal and engineering industries sector, there is sector-level collective bargaining.
- g. In the automotive industry, collective bargaining takes place under the automobile National Bargaining Forum (NBF). NBF is not a statutory bargaining council in terms of the Labour Relations Act (LRA). But in 2010 Numsa and the Automobile Manufacturers Employers Organisation (AMEO) agreed to the establishment of a statutory bargaining council in terms of LRA.
- h. In the metal and engineering industries sector, collective bargaining takes place under the auspices of the Metal and Engineering Industries Bargaining Council (MEIBC).
- i. In the motor industry sector, collective bargaining takes places under the auspices of the Motor Industry Bargaining Council (MIBCO).
- j. In the tyre sector, collective bargaining takes place under the auspices of the New Tyre Manufacturing Industry Bargaining Council (NTMIBC). There is a contention in this sector as regards the scope of the bargaining council where Numsa has been pushing for stand-alone (i.e. located outside the premises where tyres are manufactured) rubber manufacturing and tyre warehousing operations to be covered under the scope of NTMIBC. But employers are resisting. This conflict culminated in 2010 into a partial breakthrough by a conditional inclusion of a rubber-products company called Veyance Technology which was outsourced from one of the tyre companies.
- k. In sector-level bargaining, the strategic challenge facing the union is a historical compromise in terms of which there are limitations over industrial action at company-level collective bargaining on issues that are not covered, in particular the so-called on-cost items, at the sector-level collective bargaining.
- l. In the motor industry sector this limitation is contained in “peace” clauses. And in the metal and engineering industries sector the limitation is contained in Section 37, “no strike clause”. This must be addressed. In so doing the below case concerning the auto and tyre sectors must be taken into account.
- m. In the automotive and tyre sectors, employers unfairly limited the union's right to industrial action through the abuse and misuse of the “NO FURTHER CLAIMS CLAUSE”. Instead of negotiating when the union bring demands that are not regulated in the sector agreements companies used disputes of interpretation and application and referred the union's

approaches to arbitration. To respond to this unfair conduct the union took a decision to test the “NO FURTHER CLAIMS CLAUSE” through properly crafted demands. Although this took time at the end of the day there was a good achievement.

- n. In *BMW SOUTH AFRICA (PTY) LTD and NUMSA OBO MEMBERS* the Labour Appeal Court (2/11/2011) unanimously and correctly held that the “NO FURTHER CLAIMS CLAUSE” allows engagements (i.e. bargaining; negotiations) on matters not regulated (i.e. “permissible demands”) in the NBF Agreement. There are mainly three conditions.
- o. Firstly, the engagements must take place in good faith. If this is not adhered to the party that alleges the other is engaging in bad faith may refer a bad faith dispute to arbitration. If bad faith engagement is not alleged there is no need to have such a dispute. This does not constitute breach of the NBF Agreement (NB: NBF and Tyre Bargaining Council agreements have a similar wording on “NO FURTHER CLAIMS CLAUSE”). Secondly, the engagements must take place without coercion. If after that a *deadlock is reached*, the relevant provisions of *Labour Relations Act (LRA)* in terms of disputes of interest *must be followed*. Then industrial action may be embarked upon.
- p. The above ruling by the Labour Appeal Court correctly represents the union’s understanding which led to the strategic direction to test the “NO FURTHER CLAIMS CLAUSE”.
- q. However, settling the unfair manner in which companies in auto and tyre sectors abused and misused the “NO FURTHER CLAIMS CLAUSE”, and recommending that the settlement must be adopted as a model for amending the motor and engineering agreements does not mean all the challenges are addressed.
- r. *As stated when looking at globalisation, today both capital and production are highly mobile. Production volumes can be shifted from one plant to another globally at an instance. This is a THREAT on worker power within national settings. Global overcapacity makes matters worse. In addition, companies use investment decision-making to marginalise production locations where there are frequent strikes, the so-called instability. This is a problem in the context of dynamics such as unemployment and competition between countries for investment.* The Organising Strategy must respond to this challenge. The conference and its commissions are therefore called upon to develop that response.

1.4. Collective bargaining and changes in industrial structure

- a. Much of Numsa’s sector-demarcation and collective bargaining landscape is, historically and organisationally, a product of merger that culminated into the founding of Numsa.

- b. The structure of industry has undergone substantial change and capital never stops restructuring. Measures which capital constantly develops to increase surplus-value¹ are the main driver of restructuring.
- c. The restructuring process also includes changes in ownership between the hands of capitalists, local and foreign. This has and is largely taking place through mergers and acquisitions. To the extent that Transnational Corporations (TNCs) entrench through acquisition, i.e. takeover, changes in ownership reflect what we called 'transnationalisation'. Transnationalisation is, however, just but one of the aspects of the form the dominant globalisation process has taken.
- d. As part of the restructuring process and the dominant form of globalisation to the extent applicable, decision-making in transnationalised companies has been shifted. It is centralised, particularly on matters relating to production strategies and finance, at headquarters of TNCs which are mainly abroad.
- e. Also, by and large workers who previously used to be employed by one and the same company and fall under one collective bargaining scope are in a significant number of instances now employed, following outsourcing, by different companies albeit in one value chain. The working conditions of the workers so affected are differentiated through downscaling. In this, the working conditions in lagging firms within value chains is relatively severer and often more precarious.
- f. As one of the drivers to that effect, lead firms in production networks or production value chains are using outsourced or downstream operations as competitive units. This partly means that lead firms continuously squeeze their suppliers among others through product price cuts, hence pressures with negative impact over wages and working conditions in the outsourced or downstream operations or supply networks.
- g. Organisationally, industry restructuring has exerted and continues to exert pressure in the world of organising, campaigns and collective bargaining. It increasingly demands up-to-date capacity and capability adjustments in shop steward, organiser and sector coordinator personnel.
- h. Industry restructuring, combined with changes in labour relations legislation and collective bargaining landscape, has also led to compartmentalisation or confinement of collective worker solidarity within companies and sectors, in actual fact of which are sub-sectors. In that regard collective worker solidarity in the HAs and BCEA companies sectors reflect a worst case scenario.

¹ Surplus-value increased by revolutionising the technical conditions of the labour process is referred to as relative surplus-value (see Marx, *Karl Capital* Volume I for further theoretical understanding).

- i. In HAs, collective worker solidarity is fragmented. It is not well positioned to be leveraged to bring up those who are weak despite the labour-processes, in particular in the IS&BM manufacturing, being generally similar. When, for example, one company is on industrial action, another is producing. The producing company can fill the supply gap in terms of products while another company is on strike. Organisationally it is expensive, time consuming and risky for one sector coordinator to drive from one IS&BM manufacturing company to another in geographically dispersed areas of the same sub-sector to negotiate a similar set of demands.
- j. In the BCEA companies sector there is a phenomenon where collective bargaining with one company that has multiple plants or facilities in a region and between regions is taking place at each one of those plants or facilities, i.e. plant-level collective bargaining with workers' demands not consolidated at company-wide level. In this instance, even intra-company collective worker solidarity does not arise.
- k. Generally, relevant LRA provisions and case law, and the present collective bargaining landscape combined, in many ways limit all-out worker solidarity in the form of strike action. Added to this are such other factors as short time in terms of which workers lose wages. The absence of a strike fund by the union is also an issue that needs consideration. But also, high levels of indebtedness are a problem. Under these conditions and more there is a low key tendency among union members in some instances, especially where industrial action leads to loss of earnings in terms of "no work no pay" or where they believe at some stage they were on an industrial action with no solidarity action from the others.

2. Strategy, a guide to action

- a. With the exploitation of labour² as the foundation, the constant restructuring of industry by capital for self-expansion (i.e. expansion of production for surplus-value and private capital accumulation, in other words, *capital valorisation*) seeks to resolve its barriers but it only does so by means which set the barriers afresh on a formidable scale.³ Our strategy is, among other fundamental principles, always and in all the times taking into account this discovery.
- b. As such, the main content of our strategy is not only to grow and coordinate resistance to exploitation and other forms of oppression. It is, equally importantly, also to constantly identify, analyse and take advantage of the new barriers created by *capital itself as the real barrier to capitalist production*⁴. But like a force that is preparing for or is in a military battle, our strategy requires that we constantly conduct a structured self-analysis so

² See *Capital* (Volume I) by Marx, Karl, at least the chapters on the production of surplus-value, both absolute and relative, for the best theoretical elaboration of what is the exploitation of labour by capital.

³ See *Capital* (Volume III) by Marx, Karl, at least Chapter 15 Section II.

⁴ See note 3 above.

that we can identify, pay attention to and deal with our own weaknesses as well.

2.1. Growing the union: membership recruitment and sustenance, unionisation, organising and campaigns

- a. Our strategic objective is to become the single largest trade union in the metal, engineering and related industries, to grow to full potential and capacity. Concerning all time existing membership our standing task is to achieve sustenance. This makes making members, i.e. recruitment, and quality service to existing members, the central pillars of our 'O' and first 'C' in OCCB, i.e. 'Organising' and 'Campaigns'.
- b. In this regard, whereas we shall treat recruitment as a standing campaign for all seasons across all sub-sectors, employment levels and categories, in the union's scope of organising, our immediate objective is to narrow and close the gap (i.e. the number difference) between the numeric strengths of, on the one hand NUMSA members and on the other the non-NUMSA and non-unionised workers. This requires both targeted and general recruitments in all sub-sectors generally and particularly in sub-sectors where that gap is wide, e.g. motor industries sector, metal and engineering industries sector, ICET (Information, Communications and Electronics Technology), BCEA and electrical construction.
- c. At all times recruitment must be guided by a detailed analysis of what is the immediate task in each sub-sector, e.g. narrowing and closing the numeric gap between NUMSA members on the one hand and on the other non-NUMSA members and non-unionised workers, and recruiting white collar workers.
- d. Coupled with our strategy to narrow and close the numeric gap between and recruit white collar workers, we shall focus equally greatly in reviving and growing the presence of the union in sub-sectors where Numsa's membership representivity has declined, in the ICET sector, and where the union's presence is numerically low, in the electrical construction sector.
- e. Following the strategy of one union one industry, we are also called upon to engage in targeted recruitment which must contribute towards Numsa being the single largest trade union in South Africa's metal, engineering and related industries.
- f. Our recruitment strategy to ensure the growth of the union shall contain measures to ensure the sustenance of new, higher levels of membership. Quality, effective and efficient membership service is central in ensuring the sustenance of membership levels. This will assist in dealing with a phenomenon where the union is recruiting on the one side but losing members on the other side through resignations. Coupled with this, we shall constantly have to study other member benefits and seek ways to continuously improve them to make Numsa a union of choice. This area,

we have noted, has apparently become important in decision-making by workers in respect of union choice.

- g. The union may also consider engaging an organiser in every local who is dedicated to the recruitment campaign including union introductions and negotiating recognition agreements while performing other organiser duties to the extent it is possible.
- h. Our recruitment strategy shall contain measures that are aimed at achieving a breakthrough in respect of organising white collar workers. This is one of the key performance areas notwithstanding the legacies of CST and apartheid at the workplace. It is important to note that by the time we were busy developing this strategy, others were making advances to take advantage of the untransformed CST and apartheid workplace targeting white collar workers in auto assembly sector for unionisation elsewhere, in another union. Ways must be developed to effectively deal with all forms of racist and sexist organisation regardless of their manifestation.
- i. But also, the legacies of CST and apartheid are not the only barriers discovered in organising white collar workers. *The structure of the standard subscription fee is reportedly one of the reasons why some of the white collar workers are not joining the union.* To the extent it is true that the higher you go the higher the Rand and Cents value of the union subscription fee it is important for Numsa to rethink of capping the subscription fee. In this regard, as an initial proposal, *it is suggested that Numsa should cap the subscription fee at the tyre industry artisan level for all sub-sectors.*

2.2. **Campaigns, striking the balance between shop floor and macro issues**

- a. Mass campaigns are central in building the union and to recruitment. The more campaigns the union run the more awareness about it is developed. Success in campaigning, as seen from previous campaigns, attracts new members to the union.
- b. Going together with recruitment therefore campaigning must be one of the central elements of growing the union strength.
- c. This means that union campaigns must be prioritised properly, with matters immediately affecting members on the shop floor given high priority status. To this end the Media and Publications Strategy (MPS) must respond. Among others the union's MPS must serve to highlight workplace-, sector- and national-level victories on issues directly affecting workers. It must also serve to expose unscrupulous conduct and treatment of workers by employers. Both these strategic objectives for the union's MPS would require close cooperation between the departments for OCCB on the one hand and on the other hand the Secretariat, particularly the units on media and communications and publications.

- d. This strategic line does not mean campaigns on macro (broader economic and political) issues must be set aside or marginalised. To the contrary, macro issues affect members as well. What the strategic line means therefore is mastering the art of striking balance between the issues on the one hand which directly affect members at the workplace and which require immediate resolution, and on the other hand those of macro nature and character. This is an important membership sustenance strategy.
- e. Also, our strategy takes into account new avenues that are opened up by technological revolution which Marx and Engels in the *Manifesto of the Communist Party* identify as providing workers the connectivity they can leverage in the class struggle against the bourgeoisie.
- f. Information and Communication Technology (ICT) has entrenched and continues to entrench. It now offers electronic and social networks that allow people in different areas to keep in touch, hold discussions online, convene meetings and share documents. In the Numsa Auto and Tyre Sectors, such is the case with two newly established Google Groups.
- g. Taking into consideration security and intelligence operations by states and various organisations alike, the use of ICT must be entrenched but with caution. Even social networking facilities such as Face Book must be used. ICT is very important, attractive to the new generation of workers and continues to rise in cell phone use. Inability to adapt could lead to misalignment with the new generation of workers, their ways of doing things and ultimately with society's channels of connection.
- h. Organising, campaigns and collective bargaining must also be properly articulated to maximise rights for the highly organised, and *extend and intensify the rights that they enjoy to the vulnerable categories of workers*. In addition our strategy calls upon us to develop a dedicated focus on fighting for the extension of *basic or fundamental rights* to the vulnerable workers, for example in the motor industry sector and many of Small, Medium and Micro Enterprises (SMMEs). This must include creating an enabling environment for the affected workers to exercise those rights and responding harshly to victimisation of workers by employers.

2.3. OCCB system, structure and machinery

- a. In terms of our strategy, every member is a recruiter, and every shop steward, part time or fulltime, is a union organiser in his or her respective workplace to start with. This is a shift from the previous organisational renewal model in terms of which between part time and fulltime shop steward only fulltime shop steward were placed at the level of organisers. The union will continue to leverage fulltime shop stewards and even part time shop stewards where it is possible because that possibility exists, on more responsibilities outside their workplaces. All of this strategic lines requires attention be paid to the extension of paid time off for both part time and fulltime shop stewards.

- b. The union must as such mount a campaign on increasing paid time off for all shop stewards to carry out their duties with focus on addressing problems affecting workers in their respective companies, and then in other companies or elsewhere the union deploys them to do so.
- c. It is part of our organising strategy to continually increase the number of shop steward serving on a fulltime basis. This is not limited to the fulltime shop steward as known today, or should we say yesterday, but extends to fulltime shop stewards in areas such as, for example, health and safety, and one or more fulltime office bearers at the workplace from a point of view of medium to long term perspectives.
- d. Company-wide shop steward councils must be established where they are not yet established to synergise working conditions, help build a strong workplace organisation and coordinate worker struggles and solidarity at company-wide level. Where company-wide shop steward councils are in Transnational Corporations (TNCs), strategic linkages with their counterparts abroad must be developed and properly guided. This must be facilitated by both OCCB department and the Secretariat Department through the international unit.
- e. We have sector National Shop Steward Councils (NSSCs) in auto, tyre, motor, metal and engineering and we recently established a sector NSSC in the Iron, Steel and Basic Metals (ISBM) manufacturing. This is the way to go in other areas as well.
- f. A shop steward council must be established in the ICET sector to drive the process of reviving and strengthening Numsa's presence in that sector. This must be complemented by a campaign to re-industrialise the sector. In the electrical construction sector we must also do the same, i.e. build a NSSC. All of these processes must be underpinned by rigorous recruitment.
- g. In the context, all shop steward councils must no longer focus only on collective bargaining related matters as such. Too, they must serve as part of the machinery for organising and campaigns and for building the union and growing it.
- h. The structures that are dealing with training and skills development, i.e. Training Committees, must also deal with employment equity and thus be referred to as Training and Employment Equity Committees (TEECs). The youth and gender units must be represented in TEECs. In the medium to long run, even trades must be represented to improve capacity in dealing with technical details, career paths and related challenges, among others.
- i. For reasons of striking a balance between focuses on training and employment equity, the union may consider to open a new position for

coordinator of employment equity and affirmative action transformation. This also implies that a consideration may be made to move the gender unit to the department for OCCB and alternatively, include in its tasks those of dealing with matters relating to employment equity and affirmative action transformation, People with Disabilities (PwD) and the youth including coordinating the Youth Desk (YD) or Young Workers Desk (YWD).

- j. Fulltime shop stewards must form part of the Local Organisers Forum and the Regional Organisers Forum. Both the local and regional organisers forums must take place at least one a quarter.
- k. Regional Organisers and Motor Regional Organisers, along with Sector Coordinators shall form part of the National Organisers Forum which must sit at least once every quarter. NOBs must make a representative from them available to address the National Organisers Forum.
- l. Once per annum the OCCB department may convene a National OCCB Forum attended by local organisers and addressed by NOBs.
- m. There must be standing Campaigns Committees from the local to the National Level where they are coordinated by the National Organising and Campaigns Coordinator. The exact composition at the local and regional level must be looked at from time to time according to changes in conditions. However, there are specific campaigns that may require their specific Committees or Teams, such as elections. In that regard such committees and teams will close down after completing their tasks.

3. Collective Bargaining

3.1. Our strategic objective: centralised bargaining

- a. The overall collective bargaining organisation strategy is to achieve centralised bargaining, i.e. industry-wide bargaining. To facilitate this we aim to achieve what we called a mega bargaining council which must bring together bargaining councils in the metal, engineering and related industries. Our immediate strategic objectives must systematically lead to the achievement of industry-wide collective bargaining. Central to this must among others be a constant study of the continually changing conditions and unceasing exploration of effective ways to organise, maximise and coordinate worker collective solidarity.
- b. As such, and in order to take advantage of the logistical power constructed to the disposal of workers by capital through its restructuring of industry along lines of segmented production value chains which are connected by Just in Time (JIT), our strategy proposes restructuring of the present collective bargaining landscape. The new landscape is based on consolidating all processes of a commodity value chain and associated

linkages under one bargaining council as a step ahead to centralised bargaining.

- c. The JIT production strategy that industry is increasingly relying upon as superior is vulnerable depending on tactical approaches by a union. Just one stoppage in a value chain can lead to the associated production network grinding to a halt. JIT has evolved in other operations to encompass an equally vulnerable Just in Sequence (JIS).

3.2. A new, but transitional collective bargaining landscape towards centralised bargaining

3.2.1. Motor Manufacturing Industry

- a. This sector *organically* comprises of all vehicle manufacturing and assembly operations including truck and bus, and all first tier automotive components or parts suppliers, and warehousing.
 - i. Auto, truck and bus assembly, Parts and Accessories (P&A) operations.
 - ii. Auto components and parts from present Motor Industry Bargaining Council (MIBCO) and Metal and Engineering Industry Bargaining Council (MEIBC).
 - iii. Vehicle, truck and bus body building.
 - iv. Tyre and rubber manufacturing from present New Tyre Industry Bargaining Council (NTIBC) and tyre warehousing.
 - v. Motor vehicle dealers.

3.2.2. Motor service and fuel

- a. This sector comprises after sales services linked by what we called their life line, i.e. fuel refining, distribution and retail chain.
 - i. Refineries. These are presently organised by CEPPAWU. This means that strategic and tactical cooperation and merger are important as part of our strategy. It is important to appreciate the power that refineries have over fuel distribution and retail with which they make up one value chain. To this end we also draw lessons from past experiences and the need to consolidate collective worker solidarity and coordinate it effectively.

In 2010 Numsa was engaged in collective bargaining and a strike which involved fuel retailers, i.e. filling stations or garages, but production and supply from fuel refineries made it possible for fuel to reach these garages where it was sold whenever employers found mechanisms to circumvent the Numsa strike. Likewise, CEPPAWU was involved in collective bargaining in 2011 and a strike which involved fuel refineries.

But fuel was sold at garages whenever refineries found production and supply mechanisms to circumvent the CEPPAWU strike.

Also, in a strike that lasts for example seven days all considerations for a secondary strike action are not useful as the notice period for a secondary strike action.

- ii. Garages.
- iii. Fitment centres including motor parts fitment centres, e.g. fitment centres for vehicle glasses, motor electronic fitment centres, tyre fitment centres, etc.
- iv. Vehicle repair workshops including vehicle body building repairs, and reconditioning.
- v. All other motor after sale services.

3.2.3. Metal, Steel, Engineering and Electronics.

- a. Iron, Steel and Basic Metals (IS&BM) manufacturing – these are presently mainly House Agreements (HAs). Our immediate task with these HAs companies is to consolidate them into a bargaining chamber. This could not be achieved in 2011 for a variety of reasons, but it is the way to go. This is coupled with the establishment and proper coordination of company-wide shop steward councils and NSSC towards centralised bargaining.
- b. All other metal and engineering industries operations as per MEIBC except as mentioned above.
- c. Electronics (still a question mark pending further research and investigations which applies to the rest of the model).

3.2.4. Eskom.

- a. Eskom (Long-term future considerations may have to be made with regards to the consolidation of municipal electricity distribution and Eskom. It is important to note at this stage that municipalities serve along with Eskom in the Energy and Water Sector Education and Training Authority because of the role they play in the provision of electricity and water). At Eskom, Numsa has to pull all stops to increase its membership numerically.

3.2.5. Electrical contracting/construction

3.2.6. Basic Conditions of Employment Act (BCEA) companies

- a. The immediate task with BCEA companies sector is to do away with what we defined as plant-level collective bargaining to the extent that a company has more than one plant in one or more locals or in one of more regions. This is coupled with the strategy of establishing and coordinating company-wide shop steward councils.
- b. The union may consider sectoral determination on the basis of a balance of facts for a section of BCEA companies. This must be linked with recruitment and improving the quality of service to members.
- c. Our strategy requires that we develop specific approach to organising SMMEs.

3.2.6.1. With or without this proposal on collective bargaining landscape restructuring the strategy calls upon the union to develop means and ways of dealing with such other things as *short time*, *temporary lay-off* and *worker indebtedness*.

3.2.6.2. Moreover, the proposal on restructuring the collective bargaining landscape takes into consideration the question of training and skills development, qualifications development and career path within production networks and supply chains. This applies, not only in terms horizontal articulation as it is presently the case in a number of areas, but also the vertical articulation within production networks and supply chains.

3.2.6.3. This proposal also calls upon the union from time to time to re-look at its scope of organising and expand it where strategic.

3.2.6.4. One of the considerations arising from our visit to Canada is reflected in the question for discussion: *Why should NUMSA not review its organising strategy and become a global (an international) region metal and related sectors workers union with its operations extended across Southern African?* One of the underpinnings to this question is the closure of old plants and opening of new ones by companies as a strategy to undermine worker rights and achievements across the borders of neighbouring countries in the context of a global region characterised by a move to economic integration.

3.3. Dispute resolution under centralised collective bargaining and pillars of wage policy

- a. Under centralised collective bargaining the dispute resolution mechanism must be so designed as to enable a dispute to be declared both at the sector-level (chamber) and central-level (mega bargaining level) and for the union to decide where in the value-adding chain to take a strike first.

- b. Part of our tasks in this new strategy is to develop a proposal we believe will resolve the “peace” and *no strike* clauses which impose limitations over industrial action on matters not agreed to or not covered in a central/sector agreement. This must include a clearer perspective on which issues are falling at company-level. We are convinced the definition of such issues must adjust to the continually changing conditions.
- c. Points 1.3(m—r), above on ‘NO FURTHER CLAIMS CLAUSE’ presuppose three levels of bargaining under centralised bargaining. The top rung of the bargaining levels, i.e. industry-wide bargaining level, deals with, but not limited to, core and cross-cutting demands, industry-wide employment conditions and industry-wide labour market issues. The middle rung of the bargaining levels, i.e. sector-level bargaining, serves as a chamber and deals with what we called, under the present context, sector-specific issues. This clarifies the question where in the link can a particular dispute be declared in terms of 3.3(a) above. The bottom rung of the bargaining levels, i.e. company-wide bargaining level, as discussed under 1.3(m—r), deals with matters that are not regulated in the industry-wide and sector-level bargaining agreement.
- d. In terms of the income policy approach, our collective bargaining strategy forms part of the legitimate worker’s primary struggle to resist and fight economic exploitation. It is through economic exploitation that companies appropriate the product, called surplus-value by Karl Marx in *Capital*, of the labour of workers. In so doing, companies always seek to increase the amount they appropriate by suppressing the level of wages (worker income) and generally curtailing what Karl Marx in *Capital* (Volume I) called *labour time socially necessary* or *socially necessary labour time*⁵.
- e. Contrary to what the so-called employers do, ours is a just and fair struggle. We do not seek to reduce the personal incomes of the bosses, i.e. the incomes they would generate through setting their labour-power in motion if they were the direct producers just like workers are. The only thing we want is what we as workers produce. That is what we call *claiming back workers’ fair share of production*. We are fully conscious that this is not ultimately possible without winning the broader class struggle and, once for all, abolishing the wages system as clearly stated by Karl Marx in *Value, Price and Profit*. One of the characteristics that make us revolutionary is our commitment and involvement in various ways to that end.
- f. With that as the point from which we proceed, over and above placing direct wage increase demands to employers during frequent collective bargaining rounds we will pursue the following complementary pillars.
 - i. *Training, skills development, skills-based grading system.*

⁵ Generally, by *reducing* labour time socially necessary Karl Marx refers to two *things* if we may say. First, is the reduction of what he called *variable-capital* and second, is the reduction of the labour time spent to produce a product under a given set of social and technical organisation of production including the labour-process, with the degree of the intensity of skill that is generally prevalent at a given point in time.

The philosophy *from sweeper to engineer* is still relevant and must serve as our guide in dealing with training and skills development in our collective bargaining and wage strategy. And, broadly, that philosophy remains also relevant to workplace transformation in the context of redressing the imbalances caused by CST and apartheid. As such, advancing matters relating to training and skills development is important both during wage negotiations through appropriate demands and between the signing and expiry of an agreement.

Training and skills development, in particular up-skill-development in the context of a skills-based grading system, are very important in our collective bargaining and wage increase strategy. Basically, where workers are able to achieve training and skills development leading to increased credits in the context of both modular and unit standard settings they must in principle automatically progress vertically to the next upper grade. In such a context, percentage differentials between grades are basically defined, among others by credits.

A basic model from which to improve already exists in the automotive assembly industry. What we need, as part of building a strong workplace organisation, are strong and effective workplace training structures coordinated by strong upper-union-level Training and Employment Equity structures. This must include the mobilisation of workers to press companies to provide training and paid education leave for workers to receive training elsewhere. Without this the model will not work effectively as history shows us.

In terms of skills-based grading the union has been pursuing what we called a five-grade structure. The basis for this has also been achieved in the automotive assembly industry. What we need to do is build on it and move ahead.

ii. Employment equity and affirmative action.

Employment equity and affirmative action are important on similar lines and as linked with training and skills development. Employment equity and affirmative action must be pursued rigorously in a similar manner to training and skills development. Employment equity, affirmative action, training and skills development are important in our strategy to close what we called *the apartheid wage gap*.

iii. Decent work.

Step by step we have achieved some progress with the question of decent work in so far as, for example, labour brokers in certain areas are concerned. Although we are not far from the destination as compared to a point of departure, *there is still much more that we need to do to ban labour brokers*. Without reducing decent work to dealing with labour brokers, this is not only a matter of collective bargaining notwithstanding that it is extremely important. It is also a matter for

ongoing campaigning as part of the broader strategy of *decent work, confronting insecurity and precarious work*.

iv. *Social demands.*

This is both a matter for collective bargaining and state policy and therefore related advocacy and campaigns. Social demands include demands on health care; education; housing; transport (both the provision of transport, in particular for shift workers by employers, and the achievement from the state, of safe, reliable, accessible and affordable public transport system); and better savings and pension benefits.

v. *Community mobilisation.*

As part of our strategy to linking workplace and community struggles, our collective bargaining strategy includes community mobilisation and campaigning for both awareness and solidarity. In our country presently, one worker, particularly Black, shares wages with an average of five others who are unemployed. This provides the basis for solidarity in the community.

- g. When we do so we must learn from the failure of the 1990s three year bargaining strategy. In part the three year bargaining strategy linked, for instance, the question of skills training, to the duration of the agreement, i.e. three years. The employers got away with stability and least or did not deliver on skills training. Also, the reduction of grades and their reconfiguration in terms of skills, as stated, were never achieved in motor and engineering sectors. In the tyre sector, while grades were reduced their articulation in terms of jobs rather than skills was not achieved.
- h. From the above and extensive experience it is clear that once employers get what they want, they no longer care about other matters that must be sorted out. Along the way they even engage in a tendency to renege from or embark on a go-slow on other commitments (as part of cost cutting strategies and profit maximisation) as it has been proven by the setbacks suffered by skills training and skills grading as stated above. That is basically why this present strategy *links duration to achievements* rather than commitments or promises or dreams that lie somewhere ahead in a pipeline.
- i. On skills training and employment equity for instance engagements must specify targets per defined period.

3.4. Direct wage increase demands during frequent collective bargaining rounds

- a. As a starting point it is important to state the fundamental principle that guides the formulation of demands and signing of agreements and the whole collective bargaining process. Collective bargaining shall start and end with democracy. Demands come from members. A go ahead to enter into (sign) an agreement comes from members. It is from this principle we proceed.
- b. How do we respond to the question of restricting wages to headline inflation adjustment? Capitalists and all fronts of their advocates, economists and the whole of the dominant liberal media included, promote adjustment of wages by annualised backward-looking inflation and they call this a wage increase. At all that is not wage increase. In parallel and complimentary they also promote a narrow policy of inflation targeting.
- c. Here is our fundamental response. In *Capital* (Volume 2) Marx finds:

It is a general law of monetary circulation that, if the sum of the prices of goods in circulation rises – whether this increase is for the same volume of commodities or for increased volume – with other circumstances remaining the same, the quantity of money in circulation grows. The effect is taken for the cause. However, wages rise (even if seldom, and proportionately only in exceptional cases) with the increased price of the necessary means of subsistence. Their rise is the result of the rise in commodity prices, and not the cause of this. (p. 415, Penguin Classics, 1992)

- d. From that perspective also, our strategy must take wage adjustment by headline inflation as granted, obvious and automatic. Such an adjustment, even if properly calculated and pitched at a correct value, does not improve the buying power of workers. It only keeps it constant. To emphasise, *that is not a wage increase*.
- e. Also, in our situation there are, as a matter of fact, conditions under which workers' wages still fall even if they are adjusted by headline inflation. This is because, among others, rather than facing average inflation rate, workers in concrete life, at the points of payment of whatever they and their beneficiaries consume, are facing a real inflation rate against their wages as stated in the above quote from Marx. When that is higher than average inflation, the affected workers' wages rates sink and real wages fall.
- f. We have seen in Canada from the Canadian Auto workers a creative response to the above. In terms of what they called a "Cost of Living Allowance" (COLA) wages were quarterly adjusted as per increase in corresponding inflation rate. This meant that when wage bargaining took place, negotiations focused on real wage increases excluding the inflation rate component. But with the 2008 crisis the union lost this achievement which corresponded to the material conditions in Canada where wages

have been at a level where workers can lead a relatively higher quality of life than in South Africa.

- g. In our situation wage levels are generally not where workers, their households and beneficiaries are able to lead a decent and better life. Because of the legacies of colonialism and apartheid, this reality is racialised and feminised. Therefore over and above class inequalities we are still faced with race and gender income disparities. Data for the present period shows that these income disparities are rather being reproduced and widened while they are yet to be eliminated in terms of a programme we called *closing the apartheid wage gap* which remains one of our central tasks in this strategy.
- h. The battle, therefore, lies in achieving real wage increases and resisting a fall in the level and rate of wages. What we mean, by real wage increase, therefore excludes not only the headline inflation rate, but also the real inflation rate that a worker faces in concrete life. Linked with this is the challenge of moving out of the present generally dominant situation by raising wage levels to a point where workers can lead a decent and better quality of life. This is not only a mountainous task but is also complex in the global context where, especially Multinational Corporations (MNCs) and lead firms in Global Production Networks (GPNs) are coercing workers in different countries to engage in a race to the bottom with states in the same logic competing for investment. In this regard investment and associated jobs follow low cost production often with a negative impact on wages. The conference must point out a strategy in response of this formidable challenge.
- i. Moreover, we as a union are not only concerned with spending as such, but we are also concerned with raising and growing the position of a worker to make savings.
- j. All of the above must, as a basis, guide our wage increase demands. But, as we know, it is one thing to place a demand and another to either achieve it or a maximum gain out of it.
- k. As such, we will also place much attention in building capacity to achieve our demands. In addition to building strong organisation on the shop floor, the establishment of such other vehicles as a strike fund is but one of the of the important considerations the union must make. The question of strike does not ignore its limitations and the increased mobility of both capital and production. That is why our strategy takes into account the international struggle and solidarity. With respect to this, it is the contention of our strategy that the best form of international worker solidarity is for every union in the country where it organises to fight battles against the bourgeoisie without a slightest let-up.

3.5. Short- and long-term agreements

- a. We looked at the one-, two- and three-year agreements. All of these have advantages and disadvantages which will fill papers to enumerate and table. The duration of agreements is also a product of both the balance of power between the union and employers as well as concrete facts regardless whether one agrees with those facts or not. Similarly, duration in agreements has implications to the union organisation, resources and structure.
- b. Our collective bargaining strategy places emphasis on the *ability to achieve demands and maximum gain*. Under all circumstances this must be the guide to the question of duration in terms of 3.3(h) above. No duration must be more than three years – in particular durations may even be shorter than three years depending on the assessment of *achievement and gain*. This is how we must deal with the so-called stability argument of the employers.
- c. We maintain the position that sector-level duration of agreements must be aligned. This should among others allow a better coordination of collective worker solidarity and build worker power as we state above when looking at dispute resolution under centralised collective bargaining and reflecting on the vulnerability of JIT and JIS.
- d. Also, as we coordinate collective worker solidarity and build worker power we must constantly explore new sources of power. For instance pension and provident fund schemes have become an important part of finance or investment capital. It is important for workers to assert worker control over pension and provident fund schemes. This must not only be in terms of decision-making as it relates to investments but also in terms of building worker ownership of means of production.
- e. Pension and provident fund schemes are workers' wages, deferred, but companies still have control or access to control over them through the different governance structures. It is our strategy to bring this to an end. Workers, through the union must take complete control of pension and provident funds and, as the owners of that capital, use it creatively to their own benefit. This requires the reengineering of the present benefit structures in respect of returns on savings.
- f. Equally important, similar to the strategy of centralised bargaining, we must pursue consolidation and the achievement of sector-wise to industry-wide pension/provident fund schemes. That is part of, power, our goal. Coupled with this must be the building of workers' own capacity through the union to administer, rather than outsource, the administration of these funds.

4. Capacity building

4.1. Education and training for OCCB operations

- a. We must strengthen our capacity to deal successfully with all matters, including matters relating to disciplinary matters, right at the workplace. This would require the building of strong shop floor organisation with high levels of member activism and outlook.
- b. In consequence, every shop steward must be trained among others to competently and effectively handle conciliations and arbitrations. Success in achieving this strategic objective will necessarily tilt the balance of time allocation by organisers between the Commission for Conciliation, Mediation and Arbitration (CCMA) and bargaining councils on the one hand, and on the other hand, the other important OCCB operations. Shop steward training must be coupled with democratic strategies for members to retain shop stewards during elections to avoid the negative impact of a high turn over.
- c. Next to the questions of paid time off and increasing the complement of shop stewards who are available for union work on a fulltime basis, is another question from the Occupational Health and Safety (OHS) perspective. The OHS Act establishes Regulations. One of these regulations, the General Administrative Regulations (GAR), provides for the election of Health and Safety Representatives (HSRs), and requires that they be granted paid time off, training and resources. This must be pursued rigorously as part of our organising strategy. And the union must command hegemony over HSRs, their training and functioning. This must reverse a situation where in other instances HSRs are management's extensions and function according to his programming.
- d. In recent years, legal training which has necessarily established a sort of career path in legal practice has moved to occupy the centre stage in organiser training. It is important that education and training for OCCB operations ensure an all-round organiser with both functional and conceptual skills, including political education and ideological training, education and training in administrative, campaigning, problem solving, managing, bargaining and negotiating, educating, researching and analysing, advocacy, writing, reading and interpreting reports including financial reports, communication, etc. Courses in sociology, political science, health and safety, accounting, mathematics and natural sciences, communication, research, among others are also important for the union operating environment in the continually advancing world of today.
- e. For example, the question of research skills development will build the capacity, not only of OCCB as a department, but also of organisers and shop stewards alike to take a research approach on issues.

- f. The OCCB department must take the central responsibility from constant analysis of the organising, campaigns and collective bargaining terrain to guide union facilitated education and training and update the requirements for responsibilities falling within the OCCB operations. Similarly, while the OCCB department builds its own internal research capacity and deploys it along the lines of the above point, the department must effectively utilise the Research Unit which falls in the Education Department.
- g. Also, educating must rigorously be reintegrated into organising, campaigns and collective bargaining. In the context, to organise, campaign and run collective bargaining must be regarded to have as an inherent requirement, the task to educating the affected members. In this way, union education is not left to workshops alone and is not regarded as the exclusive preserve of the education department, but is also delivered in action when handling matters that affect members. One of the successes of the Canadian Auto Workers is that every department has responsibility, relative to its role, to educate members whose affairs it handles. Under the context, the education department is responsible for overall and cross-cutting union education programmes as well as targeted education programmes among others as requested by the OCCB department.

4.2. Resourcing and resources including human resources (staff) and material resources such as budget and technology

- a. Organisers must be equipped with and trained to use state of the art tools of trade including Information and Communications Technology (ICT) which involves competencies in using computer devices and network facilities. This must go hand in clove with associated training.
- b. We considered the issue of organiser to member ratio. This issue requires continuous reflection and adjustment. While recognising that this is an issue for ongoing research there is however a general view that the organiser to member ratio should remain at 1:2500 but subject to adjustments. We believe this must be flexible and lowered depending on the geographical setup of a local. Under the section where we look at the geography of locals we make a proposal in respect of a rural development approach in respect of organiser allocation.
- c. Our organisational strategy envisages the resourcing of OCCB in the regions. This includes a dedicated administrative position same as the legal department in the context where OCCB is correctly treated as the fundamental purpose of the union.
- d. From medium to long term perspectives, in the regions the union may consider opening new positions within the OCCB departments for Regional Health and Safety Coordinators. This is important in view of the workload Regional Organisers are faced with and the priority status that matters relating worker health and safety must be accorded. In the same line, a

consideration may be made for the appointment of Regional Training Coordinators. This will help strengthen OCCB operations and reposition them as the union's fundamental purpose.

- e. In terms of Local Shop steward Councils (LSSCs), the situation we come from is such that they were not equitably treated in terms of budget allocation of which must follow the same standard. This has to be rectified with ensuring that LSSCs, at least once a quarter, are fully funded from a point of view of a *basic necessities model* with catering as fundamental and next to it transport.

4.3. Model Agreements (MAs), Guidelines and Standard Operating Procedures (SOPs)

- a. One of the important strategic objectives of our strategy is to synergise the way OCCB operations are approached and conducted at the workplace, in locals and regions, and throughout the union. To this end, and as part and parcel of capacity building, we will develop MAs, Guidelines and SOPs on approaching and handling a wide variety of OCCB operations. A need for guidelines and SOPs for, but not limited to the following, areas has so far been identified.
 - i. Recruitment.
 - ii. Union introduction and recognition agreements.
 - iii. Handling disciplinary hearings and grievances.
 - iv. Handling harassment and sexual harassment cases.
 - v. Dealing with precarious work including labour brokers, Short Term Contracts (STCs), temporary and casual work.
 - vi. How to handle work and production restructuring including outsourcing.
 - vii. Handle working time reconfigurations including shift patterns.
 - viii. Declaring disputes.
 - ix. Reading and interpreting financial statements.
 - x. Handling retrenchments.
 - xi. Dealing with health and safety issues including occupational injuries and diseases, and handling related matters of compensation.
- b. To this end we identified a need for the establishment of an internal central information system where these guidelines can be accessed electronically. In addition, all agreements entered into between the union and employers must be made available in the proposed central information system. The same applies to major case laws. In short, the central information system is a reference centre that is accessible to shop stewards, organisers, sector coordinators and other union officials electronically and otherwise, and is a secured reference centre.
- c. In the same line, the union must also ensure physical reference centres with hard copies of MAs and SOPs at the head office, regional and local offices.

5. The geography of locals

- a. Under the previous organisational renewal model, local organisers were recentralised at regional offices. The present strategy categorically endorses that local organisers must be based in local offices.
- b. It is our considered view that the union must take into consideration rural development in its own internal organisation and structures. Presently, workers in rural areas and small towns are located too far from both local and regional offices as well as local and regional organisers. This must be rolled back.
- c. In order to do so, the organising strategy proposes a model whereby Numsa will enter into strategic partnerships with unions that have offices in rural areas and small towns. This must involve employing *area organiser*. These areas organisers must be based in those areas, use those offices and service members in the affected areas while being part of the nearest locals.
- d. In the medium and long runs, the above must lead to opening locals in those areas. Our visit to Canada shows that a close proximity to local offices not only provides an enabling environment for members to be in contact with organisers and vice versa, save important resources such as time and energy which would otherwise be consumed by long distance travel, but also provides an enabling environment for members to participate in the life and affairs of their own union. Although there is a difference in that South Africa's human settlement and industrial geographies reflect largely the product of colonisation and apartheid, the Canadian Auto Workers models its locals for members to be in a radius of about 20 minutes travel to the local offices.
- e. The question of the geographical size of our locals is extremely important to consider. For in our case we have locals that are bigger geographically than some of our regions. This point must also be considered to be falling under the section that is dealing with resourcing.
- f. Our organising strategy proposes the re-sizing of locals with a further research on a new model of geographically manageable locals. As a principle, to that end the strategy proposes the establishment at the national level of a standing locals-demarcations committee. This committee must constantly monitor the impact of the geography of locals. In the context, the workings of the committee which must be within the union's constitutional framework and its detailed terms of reference must be developed and presented to the relevant constitutional structures for consideration and adoption.

- g. International linkages must be leveraged as part of data gathering process in dealing with the geography and setup of locals to emerge with a best, efficient and effective model that is suited to our conditions in South Africa.

6. Linking workplace and community struggles

- a. Our strategy recognises the industrial proletariat leadership that Numsa has in COSATU. This point must propel Numsa members, shop stewards and organisers to take the work of COSATU more seriously. Central to this is active involvement in COSATU locals, provinces and at the national level. At all material times this involvement must be guided by Numsa resolutions and policy positions as a basic mandate of engagement and participation.
- b. Our organising strategy maintains Numsa's tradition of linking workplace and community struggles. To this end participation in the ANC-COSATU-SACP alliance, the tripartite alliance from a class point of view, is crucial. The ANC and the SACP are formations of our people which, together with COSATU, led the struggle against apartheid and remain relevant in advancing what we called the National Democratic Revolution (NDR) and the struggle for socialism respectively. In that regard we will constantly leverage our membership base. This includes encouraging metalworkers to join and take active involvement in the ANC and the SACP. The same formula applies to SANCO.
- c. In that regard, to draw a lesson from the visit to Canada, important community campaigns such as the campaign on safe, reliable, integrated and affordable transport, for both people including mass transit systems and goods, must in turn be linked with the manufacturing, locally, of the respective (modes of) transport.

7. International solidarity

- a. International linkages and solidarity is one of the important components of our organising, campaigns and collective bargaining strategy. This does not only concern, on the one hand developing international lessons and finding ways by which best practices can be adapted into our specific situation given its unique characteristics, and on the other hand developing best organising, campaigns and collective bargaining practices and model from our concrete experience and conditions from which other fraternal international unions can also draw lessons. It also concerns, equally important, streamlining in our international engagements strategic objectives to resolve the challenges that workers on the shop floor and in the community are faced with.
- b. As such and as part of the strategy, working together with the Secretariat Department through the International Unit, the OCCB Department must, from a point of view of the challenges faced by workers on the shop floor and in the community, initiate a process to periodically work out and

streamline conjectural strategic objectives that would form part of the union's international solidarity agenda in terms of organising, campaigns, collective bargaining.

- c. The OCCB department must search for ways to deal with the challenges of global corporate restructuring. Most of the times those affect workers employed by TNCs of which have a tendency to transcend into other non-TNC establishments, the challenges of increased production mobility, and the challenges caused by South African based TNCs in other countries. This must include a constant search for alternatives to global corporate restructuring and best articulations of the forms of organising and linkages between TNC plants locally and globally.
- d. Our international solidarity strategy includes facilitating linkages for workers in TNCs through shop steward committees and such other structures that are relevant according to country situation. The agenda of such linkages must include the task of dealing with global corporate restructuring and its impact over workers and their communities.