The role of trade unions in the policy cycle
The role of trade unions in the policy cycle
Quick overview

This section gives an overview of the national employment policy process and the entry points for trade union engagement. It is based on the Guide for the formulation of national employment policies (ILO 2012a). In practice, of course, there will be variations in the way the process unfolds. There could be delays between stages, or there could be many activities taking place at the same time. This overall picture of the process is meant to be helpful in planning, thinking ahead and strategizing.

This diagram shows the policy process as a cycle with seven stages. In the centre of the cycle, we see various ways that trade unions may be involved. The nature of the activity varies with each stage. We will discuss each of these stages and activities in more detail in the next sections.

The 7 stages of the policy process
## An overview of the role of trade unions in the policy cycle, stage-by-stage

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<th>Objectives</th>
<th>Description and trade unions’ role</th>
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<tr>
<td><strong>1. Preparation</strong></td>
<td>Put in place the organizational framework for the policy process.</td>
<td>Trade unions should designate one or more representatives to systematically participate in the organizational framework for the NEP process. First, all key players should be identified. Second, a tripartite and inter-ministerial steering committee should be set up to ensure policy coherence, ownership and sustainability. Third, a technical team is needed to animate the process. The roles of everyone in the framework should be clearly defined.</td>
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<td></td>
<td>Define the policy’s overarching goal (Example: “The attainment of full, productive and freely chosen employment for all women and men”).</td>
<td>The long-term goal of the policy is based on sources such as the national development framework, the country’s vision and the presidential programme. Dialogue with the key players is also essential. Workers’ organizations should be associated to the definition of the employment policy goal. They need to be ready to contribute substantially.</td>
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<tr>
<td></td>
<td>Prepare a timeline for the policy process. Plan and budget for the resources needed.</td>
<td>One of the first tasks of the organizational structure is to prepare a timeline and identify the resources needed to steer and implement the national employment policy process. Trade unions should take good note of the calendar of events for the formulation process. They should be proactive in getting information on how they can participate most effectively in the process. They should identify the resources they need to effectively engage.</td>
</tr>
<tr>
<td><strong>2. Issue Identification</strong></td>
<td>Produce the statement of issues which identifies the opportunities and constraints of the labour market.</td>
<td>This stage involves research and broad-based consultations to collect all stakeholders’ views on the challenge they face and, in the case of trade unions, their constituents’ needs and demands. Workers’ organizations can play a particularly valuable role in identifying emerging policy concerns and in providing independent critical analysis. Because of their involvement with workers at the grassroots level, trade unions are aware of trends or emerging issues that other partners, including the government, might ignore.</td>
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### Stages of National Employment Policy Formulation and Administration

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<tr>
<td>3. <strong>Formulation</strong></td>
<td>Prioritize issues identified in Stage 2. Choose 3 to 5 priorities for the national employment policy. Define the objectives corresponding to these priorities. Decide on policy interventions to achieve these objectives.</td>
<td>Trade unions have a key role to play in influencing the choice of priorities for the national employment policy. They also have an important role in precisely defining the statements of policy objectives. Trade unions have a role to play in discussing various policy options to achieve the objectives, bringing their own information to the debate based on direct experience and involvement with their membership.</td>
</tr>
<tr>
<td>4. <strong>Adoption</strong></td>
<td>Obtain a national consensus on the national employment policy.</td>
<td>Once drafted, the national employment policy should be submitted to the key stakeholders (both tripartite and inter-ministerial). This is the last opportunity for trade unions to voice their concern and advocate for the incorporation of their suggestions. The national technical team in charge of drafting the national employment policy should integrate the comments received and finalize the policy document.</td>
</tr>
<tr>
<td></td>
<td>Give all authority necessary to ensure the national employment policy is taken seriously by all actors.</td>
<td>Adoption by the government is a key step to give an executive force to the national employment policy. This may take various forms, such as a statement, decree, or law.</td>
</tr>
<tr>
<td></td>
<td>Let people know about the national employment policy (disseminating and communicating).</td>
<td>Everyone who is affected by the national employment policy should know about it. However, this phase is often neglected. Workers’ organizations can make significant contributions by simplifying employment policy documents and disseminating them in user-friendly formats, deepening the debate. They can organize awareness-raising events and advocacy initiatives.</td>
</tr>
<tr>
<td>Stages</td>
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<td>Description and trade unions’ role</td>
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<tr>
<td>5. Action planning</td>
<td>Clearly define the ways and means by which the objectives of the national employment policy are going to be achieved.</td>
<td>This stage takes time and labour, but it is the key to putting policy into action. Trade unions sometimes ignore it, because it is less visible to the public than the other steps of the policy cycle. But at this stage, critical decisions are made that will ultimately determine the effectiveness of the national employment policy. The policy's outputs, activities and inputs (such as financial and human resources and equipment) are defined. The monitoring framework is designed with 'smart' indicators for all outputs and activities. The coordination mechanism is made operational. At this stage, it is important that workers’ organizations provide input to ensure that the program and budget decisions reflect their views and what was agreed upon in the national employment policy. They should also commit to directly implementing some parts of the action plan. If they are excluded from this process, they should advocate for more access to budget and decision-making.</td>
</tr>
<tr>
<td>6. Implementation</td>
<td>Turn the policy vision and the action plan into reality.</td>
<td>Translating the NEP into reality is not as simple as it sounds. It entails changing habits and ingrained ways of dealing with employment issues. Trade unions must find a way to fully play their role in coordinating and implementing the NEP. They should fully engage in the steering committee and build the capacity to face up to their implementation responsibilities. Workers’ organizations can also help to promote public sector transparency by building a culture of accountability about the implementation of the national employment policy.</td>
</tr>
<tr>
<td>7. Monitoring &amp; evaluation</td>
<td>Measure and evaluate the results of the policy’s action plan and analyse what needs to be done in the future.</td>
<td>Workers’ organizations can help ensure the regular monitoring of the policy's implementation, both as producers of information and users of information produced by others. Trade unions are well situated to produce certain types of monitoring information as the policy is put into practice. They can also analyse monitoring information and share and discuss it with the membership. Trade unions should be very involved in evaluating the policy's effectiveness, to see if it is meeting its original intents and if there are any unintended outcomes, both positive and negative. A mid-term evaluation can help to reorient the policy if needed. A final evaluation can be used for the formulation of a new national employment policy.</td>
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3.1. Stage 1: Preparation – The role of trade unions in launching the policy process

Trade union membership in the policy’s steering committee

In most cases, the government creates a steering committee entrusted with the mandate to formulate the national employment policy. This steering committee is tripartite, composed of government members and representatives of employers’ organizations and trade unions. Trade unions must find the ways and means to be active in this committee throughout the process.
One good practice is to nominate at least one trade union staff member to be the focal point within the organization. This person represents the union in all meetings throughout the process. Participation should be sustainable over time.

In countries where many trade unions co-exist, they may not all have an opportunity to have representation on the steering committee. This is true, in particular, when a decision is made to keep its size relatively small. The challenge then becomes finding ways to coordinate workers’ viewpoints and organize common representation. This can be done by establishing a platform for the defense and promotion of trade unions’ interests.

For example, this might take the form of an inter-trade union committee to follow-up on employment issues and contribute inputs to the preparation of the national employment policy. Trade unions can then agree on one or two workers’ representatives to sit on the steering committee on behalf of the country’s trade unions.

At the same time, each trade union should be responsible for holding separate, internal meetings with their own constituents. This allows for more intensive discussions, enabling individual unions to think things through and define their position.

**Planning activities and resources needed for trade union participation**

Two of the steering committee’s first tasks are to:

- Prepare an annual timetable of key policy development events.
- Identify the resources needed to steer and implement the NEP process.

This is a good opportunity for trade unions to take good note of the calendar of events for the formulation process. They need to be in the right place at the right time. They should be proactive in getting information about how they can participate most effectively in the process. They also need to identify the resources they themselves need to effectively engage.

**Strong trade union participation means building capacity and expertise**

It is not easy, with tight resources, to maintain participation in all the meetings and activities throughout the national employment policy cycle. Trade unions have to think about how they can build capacity.

They may need to dedicate staff to employment policy to ensure continuous exchanges between the government and workers’ organizations. Such staff would need advocacy skills and expertise. They would be responsible for regular communication with other stakeholders, for getting timely information on the process and for forging working relationships with the ministry responsible for employment and other key actors.
Trade unions also need to strengthen technical capacity. Lack of financial resources is a concern, but the need for expertise should receive high priority. Lack of policy expertise limits the value an organization can add to the process. There is a danger that the dialogue will become ideological rather than evidence-based. Internal capacity can be built up by creating a policy research department and staffing it with the required experts. Unions can also forge partnerships with academics on specific research issues, and they can share their research with one another.

For example, the African Labour Research Network is a leading think tank on labour issues. Formed in 2001, its members are labour-related research institutes and research departments of trade union federations in Africa. The network aims at strengthening the capacity of trade unions to engage policymakers on issues that affect workers and their families through cutting-edge research.

Developing a clear vision or goal

A national employment policy is designed to take the employment situation from wherever it is right now to the accomplishment of a stated vision or goal – “What is it that we are trying to achieve here?”

Workers’ organizations should be involved in defining this broad policy goal. It provides an overall direction for the specific, practical and measurable employment objectives that they will help to set in Stage 3.

The International Labour Organization gives an example of this type of overarching vision or goal in employment policy convention No. 122: “the promotion of full, productive and freely chosen employment” (ILO, 1964). Another example is the employment goal of Madagascar’s National Employment Action Plan: “to contribute to the generalization of decent work to reduce poverty” (Government of Madagascar, 2006).

Too often, policy-making quickly gets bound up in options and solutions with unclear goals. The risk is to introduce measures that address problems in a flawed way. Before going into the problem-solving step, it is necessary to clearly define the long-term and ‘high-level’ policy goal.

Having a clear policy goal is a good way to start because it puts everyone on the same path.
3.2. Stage 2: Issue identification – Using an employment diagnostic

What is an employment diagnostic?

Policies that are built on rigorous evidence are more likely to yield good outcomes. That is why it is important to use research evidence to identify policy issues. The research approach is called an employment diagnostic. An employment diagnostic describes the labour market and employment situation and identifies the policy issues that need to be addressed.

An employment diagnostic does not identify priorities or present policy options. This happens at Stage 3, Formulation. Although it is research based, a good employment diagnostic goes beyond academic research to include broad-based consultations with
all stakeholders. It requires collaboration and data sharing among government, research departments, independent research institutions and all of the social partners. The considerable experience of trade unions should be taken seriously.

The employment policy diagnostic should be seen as a “work in progress”, because one diagnostic exercise cannot cover everything, and employment challenges evolve over time. It will be necessary to identify what needs to be analyzed first and what needs to be integrated into future policy cycles.

The employment diagnostic should be widely shared and discussed, not reviewed behind closed doors by a limited number of government officials. It is not a good practice for governments to hire a consultant or a think-tank to do the diagnostic, which is then discussed in a tripartite meeting without adequate time for trade unions to digest the report and prepare their arguments.

Done properly, the employment diagnostic becomes a key tool to help decide on the objectives of the national employment policy. It will:

- Enrich the social dialogue with robust and credible evidence and prevent them from becoming purely ideological debates where points of view are irreconcilable.
- Foster advocacy efforts with solid diagnostic analyses pointing to the root causes behind employment issues.
- Support Stage 7 (monitoring and evaluation) by providing information to develop the national employment plan targets and benchmarks for evaluating the impact of the NEP.
What is the most efficient way to build knowledge for the diagnostic exercise?

Start with what is already available.

In many countries, lots of analysis and research has already been undertaken. Look at existing policies and programs. Look at recent studies, reports and articles. Identify in-progress and planned research relating to employment, so as to not duplicate efforts. Trade unions produce a lot of knowledge that should be collected and used. Consult with members and produce an inventory of what is available.

Identify the gaps and the areas that need deeper analysis.

The areas you choose for more research will be influenced by the government’s priorities as well as external events (such as natural disaster, economic downturn or food crisis). Trade unions have solid experience of the world of work and can play a valuable role in identifying employment challenges that should be further researched.

Build new knowledge.

There are many ways to produce an employment diagnostic. They can involve research, data analysis, modelling and scenario-building exercises, as well as policy, institutional, legal and expenditure reviews. Trade unions can contribute by providing first-hand information to feed in the employment diagnostic.

They can also undertake their own research. In this case, it may be strategic to consider with whom to establish partnerships. Joint contributions not only share costs but also ensure the research will reach the widest audience possible and be credible to government officials. Working with the right partner will ensure that the diagnostic findings are being used and are not ‘left in a desk drawer’.

In some cases, where trade unions felt they were technically not up to detailed discussions on socio-economic policy, they have recruited consultants and expertise from the universities or research centres. In other cases, trade unions have hired professionals to complement their research staff.

Share the research.

Participate in communicating the research and making knowledge intelligible. Think of evidence as transmittable: to the point, easy to digest and shareable. Use it for advocacy with decision makers who hold the power to implement a change in policy or law. Advocacy can also be about changing public opinion to support the employment cause.
Take stock of existing knowledge
What are the gaps?
What are the areas that need deeper analysis?
Build new knowledge
Research, interviews, data analysis, focus group, etc.

Share the knowledge

Trade Union Congress - Ghana

Traditionally, the research activities of the Trade Union Congress in Ghana have focused on wages, with very little attention to wider socio-economic issues.

Participation in the first Ghana Poverty Reduction Strategy showed the need to upgrade the research division to enable it to undertake work that will help it to influence national policies. The Trade Union Congress has therefore hired two professionals to complement its research staff.

What should the employment diagnostic look at?

Look at the broader issues

To be truly effective in advocacy, make sure the diagnostic resonates with the wider national priorities (such as the national development plan).

Do not limit the diagnostic exercise to the traditional labour market issues, such as wages. Look at other elements that have an impact on labour market performance. Here are some examples:

• Advocate for looking at the macroeconomic framework as part of the diagnostic exercise.
• Identify the economic sectors that have the highest potential to generate value-added and productive employment. What are the constraints in increasing productive employment in these sectors?
• Poverty analysis can help identify what types of jobs are more likely to benefit the poor.
• Employment and labour market analysis examines the labour market situation and the main determinants of employment.

• Employment policy reviews identify the economic, social and legal contexts that affect employment.

• Look at the institutional environment. Adequate institutions, with sufficient, trained staff are essential conditions for implementing a national employment policy. Reviewing the institutional framework is hence also key.

• Review public spending to assess its impact on employment outcomes. For an example, the International Labour Organization has documented the experience of Public Works in Chile (ILO, 2010).

CASE STUDIES

El Salvador

In El Salvador, the trade unions prepared a position paper that presents their priorities for the national employment policy (ILO, 2013a). This document contains a detailed diagnostic of the employment situation. It includes an analysis of labour market data, of the macroeconomic situation and of the labour market. It then presents the priorities identified on the basis of the diagnostic, followed by concrete suggestions on measures that need to be taken.

The vision of the trade unions for the national employment policy is “Overcome poverty, with jobs” (Superar la probeza, con empleos). Their goal is to “generate employment opportunities to improve the quality of life of working families”.

The Salvadorian trade unions also prepared a document that highlights the areas where the unions need to strengthen their capacities to engage effectively in social dialogue around the national employment policy.

This was a common effort of the two main trade unions in the country with support from the International Labour Organization.
Mongolia

The Confederation of Mongolian Trade Unions played a significant role in the national employment policy-making process. It trained its leaders on important concepts of decent work, prepared an employment policy position paper, contributed to tripartite discussions and supported union leaders engaged in the implementation of the national employment policy.

The confederation contributed to the employment policy through a position paper, The role of trade unions in employment strategies (Ahn, 2014). To make the study participatory and collect a wide range of views, the confederation organized one-day group meetings in four provinces located in the north, south, east and west. Each meeting was attended by 10 to 15 union leaders. To finalize the position paper, a national consultation meeting took place in May 2011 with 40 participants representing 13 provincial federations and 25 industrial federations.

The paper’s diagnostic uses the International Labour Organizations four strategic objectives: labour standards, productive employment creation, social protection and social dialogue. It also analysed the lessons learned about employment recovery patterns in Mongolia in the aftermath of the 2008 global economic crisis. It discussed the potential growth industries for employment generation in the country.

These findings were used as background material for the confederation’s capacity building workshops. A “CMTU/ILO Capacity Building Workshop” was held in Ulaanbaatar in September 2011. It presented the position paper to the leaders, enhanced the level of their understanding on the impacts of the global economic crisis on labour and employment and introduced them to the policy recommendations of the ILO 2009 Global Jobs Pact (ILO, 2009).

The workshop led to the successful development of union proposals on employment promotion strategies. These were
presented at the Tripartite Forum on National Employment Strategy held in Ulaan Baatar in September 2011. They contributed to the formulation of the national employment policy.

Then in November, 2011, the Confederation held the CMTU/ILO Union Capacity Building Workshop on a National Employment Strategy for Mongolia in Orkhon Province. This was a window of opportunity for 35 participants from 10 different provinces to review the draft national employment policy from the perspectives of trade unions. They made a number of comments on issues related to using ambiguous terminologies, the unrealistic timeframe of each action plan, the unspecified role of trade unions in its implementation and the lack of a gender dimension.

Many of the confederation’s activities were covered by the local newspaper and air media and this publicity added value in the form of public advocacy.
Other issues to pay attention to:

- Make sure that the analysis is not confined to identifying problems, such as high unemployment or low wages, with little or no analysis of the underlying causes. This is not always easy. A broad set of cultural, social, economic, institutional and legal forces affect employment. Be careful not to overly focus on a single cause. Make sure to factor in variables that cut across issues, such as gender and age.

- Ensure that the knowledge produced is credible. To this effect, advocate for the use of existing planning-tools and for working with the right partners that have legitimacy and expertise in the areas that are researched.

- Make the best case evidence by combining the national and the universal, quantitative and qualitative data, to tell a compelling story as succinctly as possible.

To reduce working poverty, we should implement a minimum wage indexed on GDP growth.
3.3. Stage 3: Formulation – Setting priorities, objectives, outcomes and indicators

In most countries, the list of issues emerging from employment diagnostics tends to be long. Addressing all these issues at the same time may result in doing too little of everything. That is why setting priorities is essential. Concentrating on a few well-defined areas of concern is far more likely to have impact than trying to push for a wide range of priorities.

Each priority then needs to be translated into a policy objective. An indicator must then be chosen to measure performance in reaching the objective and to help evaluate the outcomes.

Trade unions need to come well prepared to these discussions. Priority setting is the result of a combination of political and technical judgments. It depends on the interactions between different interest groups (including trade unions), but it is also based on technical considerations. It is crucial to be strategic and realistic about the priorities to push for.
Setting priorities

Start with a list of all the problems identified during the diagnostic. Identify a maximum of five priorities based on clear criteria. Using clear criteria helps you make the case for the choice of one priority over another when meeting with other stakeholders. These criteria include:

- National circumstances: Is your country undergoing an economic crisis? Is it experiencing high economic growth rates? Is the population aging rapidly or is there a ‘youth bulge’? Are industrial relations tense or smooth? Was a new government recently put in place or are elections looming?
- National priorities: Link employment priorities with the priorities of the national development framework or the presidential program. Determine the main areas that are most politically acceptable to the Government.
- Financial and human resources: Is addressing the chosen priority affordable, realistic and sustainable over the course of the policy?

This table shows the thinking process for setting priorities in Liberia for its 2009 national employment policy.

Example: Liberia’s 2009 national employment policy

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Situation</th>
<th>Choice of priority</th>
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</thead>
<tbody>
<tr>
<td>National circumstances</td>
<td>Post crisis (civil war ended in 2003)</td>
<td>• Scale-up direct emergency job creation: public works</td>
</tr>
<tr>
<td></td>
<td>Severe impact of the global economic crisis in 2008/09</td>
<td>• Enhance sustainable opportunities for productive decent work</td>
</tr>
<tr>
<td></td>
<td>The vast majority of people live in poverty</td>
<td></td>
</tr>
<tr>
<td>National priorities (Liberia Poverty Reduction Strategy)</td>
<td>Rebuild essential infrastructure</td>
<td>• Employment-intensive infrastructure rehabilitation and public works programmes</td>
</tr>
<tr>
<td></td>
<td>Revive the traditional engines of growth in mining, minerals, forestry and agriculture</td>
<td>• Upgrade educational and skill levels to match demand in key growth sectors and to increase labour productivity</td>
</tr>
<tr>
<td></td>
<td>Establish a competitive business environment to help diversify the economy in the medium term</td>
<td>• Promote competitive and sustainable small and medium-scale enterprises</td>
</tr>
<tr>
<td>Availability of resources</td>
<td>Country is low income, highly dependent on foreign aid</td>
<td>• Scarce resources should be directed to rebuilding essential infrastructures through emergency job creation programmes</td>
</tr>
<tr>
<td></td>
<td>Global economic crisis imposes severe budget constraints</td>
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</tbody>
</table>
High youth unemployment rate

Education and training not responding to labour market needs
- Outdated curricula and programmes
- Lack of linkages with the world of work

Shortage of jobs for young people
- High growth sectors do not create jobs
- Small and underdeveloped private sector

OBJECTIVE: Improve access and standards of technical and vocational education and training (TVET) and focus curriculum on meeting the demand of the labour market

INTERMEDIATE OBJECTIVES
- Reform Technical Vocational Education and Training system with involvement of the social partners
- Quality assurance system
- Skills needs assessment
- Provide short-term retraining to newly graduated youth
- Review apprenticeship training model and scale-up proven initiatives
- Provide “second chance” training
- Provide business development services for young people
- Adopt an industrial policy that will promote job-rich sectors
- Build required infrastructures to enhance the development efficient value chains
- Extend unemployment benefits to young people
- Develop entrepreneurship skills. Make entrepreneurship a career option.
- Reduce or eliminate unnecessary business regulations and administrative requirements.
- Reduce administrative costs (e.g. revise tax code, provide targeted subsidies to newly created firms)
- Improve access to credit to promote self-employment and micro and small and medium enterprises (e.g. establish an employment fund to distribute credit to newly created start-ups)
Setting policy objectives

Once priorities are set, the focus of the analysis shifts from finding out what happened to why. An employment diagnostic tree is a useful tool to identify the causes and effects of an employment issue (ILO, 2012b). The identified causes, or branches and sub-branches of the employment diagnostic tree, will correspond to a menu of possible interventions to address them and solve the higher level objective.

For example, in the tree below, the main issue is the high youth unemployment rate in a country’s urban areas. Some of the causes identified in the tree are:

- A small and underdeveloped private sector.
- Very low job creation potential in the country’s growing economic sectors.
- Outdated technical and vocational education and training.
- Lack of linkages between education and training and the world of work.

For each of these causes, the diagnostic tree proposes interventions.

Drafting objectives

Who writes the national employment policy? Government leads the process, but in most cases the policy goes through many versions or iterations, involving a wide range of stakeholders, including trade unions. Ideally, there should be two or three drafts circulated for comments.

Trade unions need to be involved in the wording of the national employment policy. They need to take part in translating the priorities into a clear and concise policy framework.

Every time a policy priority is identified, some statement of objectives is adopted. The objectives are what the policy should accomplish. Objectives are broad, formal, long-term problem-solving achievements. They need to be drafted carefully and be as precise and explicit as possible.

Going back to our example of youth employment from our diagnostic tree, here is an example of a draft objective, showing how being explicit and precise makes it better:
Drafting outcomes and indicators

Once you have a clear picture of what you want to accomplish overall (the national employment policy goal), as well as what objectives will move you towards the goal, you need to decide what measurable milestones you will need to hit throughout the time span of the national employment policy.

**Outcomes** are concrete statements about the desired effects of a policy. They describe a measurable change expected to happen within a given timeframe. They are always connected to an objective.

When writing an outcome, draft a specific, measurable, obtainable achievement. Going back again to our example of youth employment, here is an example of a draft outcome, showing how being concrete and specific makes it better:

New technical and vocational education and training curricula and programmes, revised with the involvement of the social partners, applied in educational institutions

When drafting objectives and outcomes, avoid vague and overly technical language:

Encourage development and allow growth only in physiographically suitable areas

Urban development shall only be permitted in areas with the appropriate topography and soil conditions to support such development.
**Every outcome must have an indicator**

An indicator is a research instrument that gives information to measure achievement or reflect changes connected to a policy intervention. Here are some examples of types of indicators:

- Time or deadline: Period by which the result must be achieved.
- Quantity indicators: Targeted percentage points measuring an achievement, such as an employment rate. The target may have a range with upper and lower bounds.
- Quality indicators: Targeted quality levels such as high, medium or low. For example, if you were assessing a draft national development plan, you could rate its focus on employment as “high”, “medium” or “low”.
- Activities undertaken: An example might be the number of training workshops, meetings, and conferences that are to take place regularly. The outcome might be written: “The Consultative Body shall hold at least two sessions yearly to address issues of concern and monitor implementation of the policy.”

Here are some examples of indicators for the objectives and outcomes in our technical and vocational education and training example:

<table>
<thead>
<tr>
<th>Outcome</th>
<th>Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>New curricula and programmes, revised with involvement of the social partners, introduced in all educational institutions</td>
<td>Reducing the skills mismatch - Improve access and standards of technical and vocational education and training and focus curriculum on meeting the demand of the labour market</td>
</tr>
<tr>
<td>Indicator (deadline): New curricula and programmes introduced by the year 20xx</td>
<td>Indicators (quantity): Share of hard-to-fill vacancies (by occupation) to total vacancies down by x percentage points</td>
</tr>
</tbody>
</table>
How can trade unions influence the choice of policy alternatives?

Internal consultation and debate

Trade unions need extensive discussions with their members and affiliates to define a common position. These discussions will naturally place a high priority on issues of direct concern to the membership, but it is crucial that they also focus on wider measures to promote employment.

Social dialogue

Trade unions will favour some policy alternatives more than others in the employment tree diagnostic. To be heard, trade unions need to lobby for tripartite dialogue involving the government, trade unions and employers’ associations. Social dialogue will ensure consensus and a common platform.

Trade unions must have representation on the national employment policy steering committee and they must participate effectively in other meetings and workshops where policy priorities and options are discussed.

Well prepared, evidence-based arguments

Saying “This should be the priority” may be accurate but is not helpful in changing opinions. Specific statements and robustly substantiated analysis can. Showing what worked in other contexts may be a compelling, evidence-based policy argument.

It helps to be prepared for the discussions and debates. In advance of social dialogue meetings, prepare evidence-based policy arguments in favour of a limited number of priorities (maximum five). Describe targeted policy interventions for each of them. Submitting a detailed position paper can help to better voice concerns.
3.4. Stage 4: Adoption – Finalizing and communicating the national employment policy

Ideally, the national technical team responsible for drafting the national employment policy will circulate drafts for comments and consolidate these into a final draft. They will then organize a national-level forum (triptite and inter-ministerial) for validation (a validation workshop).

How much negotiating space is there at this stage? This is the last opportunity for trade unions to voice their concerns and advocate for the incorporation of their final
comments. Keep in mind that transforming a large number of stakeholder submissions into a coherent and affordable strategy is challenging. The drafting team has probably been overwhelmed by the number of issues and has struggled to glean the main priorities from a huge amount of information.

Because negotiating space is narrow at this stage, it is all the more important to:

- make strategic policy suggestions
- make a strong, evidence-based case grounded in the country’s reality
- move beyond general statements to suggesting ways forward that are costed and realistic.

Lobbying for adoption

Once the draft policy has been properly debated, the national technical team draws up a final policy. It is then submitted for adoption to the relevant government bodies. The government then decides on the official form the policy takes: it could be a statement, a decree, a law or some other form. In some cases, formal adoption may take time or be delayed. At this stage, the process moves away from being a technical exercise and becomes a more political one. If you are happy with the document, lobby for its adoption.

Communicating the policy to your constituents and beyond

Trade unions have a key role to play in creating ‘ownership’ of the policy. Ownership is needed to ensure that there is commitment to the policy and accountability for its implementation. Creating ownership requires a sound communication strategy. Workers’ organizations can make significant contributions because of their experience in simplifying complex ideas for their members in user-friendly formats.

There are many ways to get the message across to the membership and the wider public:

- Report regularly to the membership on how the policy is being implemented.
- Make copies of the official policy document available to all of the membership and have them deposited in the libraries.
- Carry out print-based information campaigns in local languages giving information about, for example, the goal and the objectives of the policy, its priority measures and those responsible for implementation.
- Hold public debates locally or on radio or television.
- Conduct web-based discussion forums.
- Hold briefing workshops or awareness-raising activities at the national, regional and local levels.
- Hold press conferences and lobby at public meetings.
- Organize capacity-building training activities with the support of the ILO Bureau of Workers Activities and workers and employment specialists in ILO sub-regional and country offices.

**Example:** *The National Union of Metalworkers of South Africa (NUMSA) uses cartoons to explain the national development plan*

> **HELEN AND TREVOR MEET IN AN AIRPORT LOUNGE AS THEY ARE ON THE WAY TO A CONFERENCE. THEY DON’T REALISE THAT NUMSA’S IRVIN JIM IS SITTING BEHIND THEM IN THE SAME LOUNGE. HE OVERHEARS THEIR CONVERSATION.**

**TREVOR:** It’s good to see you. I’ve been wanting to have a chat with you for a while.

**HELEN:** And I think you will be interested in seeing the final draft of the NDP.

**LEON:** Let me see if I can get a photo of this. It will look so good in NUMSA News.

**ORGANISED WORKERS PROTECT THEMSELVES AT THE EXPENSE OF THE UNEMPLOYED. EXACTLY**

**THEY MAKE THE PRICE OF LABOUR TOO HIGH SO BUSINESS DOESN’T WANT TO EMPLOY**

**SO, ACCORDING TO BOTH OF THEM, UNEMPLOYMENT IS OUR FAULT?**

---

**The DA says:**
Cosatu has become a stumbling block to job creation

**The NDP says:**
Worker leadership must allow the unemployed more access to jobs.

**Numsa says:**
They are both saying the same thing. They are saying that unemployment is caused by trade unions. Now we can see we are right; the NDP copies DA policies.

3.5. Stage 5: Action planning – Programming and budgeting the national employment policy

“Vision without action is only dreaming, action without vision is only passing time, but vision with action can change the world.”

Nelson Mandela
Trade unions tend to be more engaged in the early stages of the national employment policy process, but less so or even not at all in the later stages. Trade unions need to sustain effective engagement throughout the policy cycle, including action planning, implementation, monitoring and evaluation.

The national employment policy should be accompanied by an operational document or action plan. It can be a separate document or included in the policy itself. The action plan should clearly determine:

- what action or change will occur
- who will carry it out
- by when it will take place
- what resources are needed to do it.

From policy planning to implementation: Action planning

Inputs are the resources needed for the actions to be taken. These might be human resources, financial resources or equipment and ‘bricks and mortar’.

In action planning, outputs or results are the direct products of actions taken to pursue policy outcomes. All of these inputs, activities, and outputs will, we hope, lead to achieving the outcomes, objectives, and overall goal we set in policy planning.
What to look at in the design of the action plan

• Check to make sure that the plan is aligned with the priorities established in the national employment plan document.
• Are the priorities you pushed for actually embedded in policy actions?
• Is there consistency between the stated objectives and proposed actions to achieve them?
• Figure out which activities your trade union can be involved with or responsible for.
• Make sure that the format of the action plan is aligned with national practices. For example, in most countries, results-based management is the rule. The format of the action plan should comply with it by focussing on measurable results.
• Make sure there are timelines on everything. Without specific time frames and deadlines, some tasks may never get completed.
• Check to see if responsibilities are clearly set out. Trade unions can play a role in choosing the right institutions and people to carry out activities for the plan. These should be people and institutions that can stay engaged over the whole period of implementation.
## An action plan template with an example

**Objective 1:** Improve access and standards of technical and vocational education and training (TVET) and focus curriculum on meeting the demand of the labour market

**Outcome 1.1:** Revised curriculum for vocational and technical education and training linked to the needs of the labour market

<table>
<thead>
<tr>
<th>Activities</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nominate one person in each region to conduct the inventory</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Conduct the inventories</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Consolidate the inventories of each region into one document</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Publish the document in both print and electronic forms</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Outputs**

<table>
<thead>
<tr>
<th>TVET structures</th>
<th>Responsible</th>
<th>Partners</th>
</tr>
</thead>
<tbody>
<tr>
<td>TVET institutions</td>
<td>TVET Department, Ministry of Labour (MoL)</td>
<td></td>
</tr>
<tr>
<td>TVET departments</td>
<td>TVET Department, MoL</td>
<td>Secretariat General of MoL, Ministry of Finance, ILO International Training Centre</td>
</tr>
</tbody>
</table>

**Estimation of resources required**

<table>
<thead>
<tr>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Outputs**

<table>
<thead>
<tr>
<th>Outputs</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>An inventory of all vocational/technical training institutions is available in printed and electronic forms</td>
<td>TVET Department, MoL</td>
</tr>
<tr>
<td>The curriculum of all vocational/technical training institutions is aligned</td>
<td>TVET Department in the MoL is strengthened to supervise and monitor implementation of the new curriculum</td>
</tr>
</tbody>
</table>
Financing the national employment policy

National budgets are the main tool for moving beyond wishful thinking on employment towards concrete results. Budgets set out a government’s priorities often more accurately than the policies on which they are based.

Yet it is hard to find the employment content in a national budget. For example, the Conference of African Ministers of Economy and Finance raised this concern in 2010:

“National policy announcements on job creation are rarely linked to quantifiable budget targets and disappear once the budget preparation process is completed. In other words, employment does not feature in the end-of-cycle assessment of the budget … Coordination across ministries, especially ministries of finance and labour, have been a missing link when it comes to employment policies.”

There are two reasons for this disconnect. First, the prevailing view of employment for many years has been that it is the result of economic growth and social investments in things like education and health. This view makes it unnecessary to explicitly integrate employment in public budgets. Market forces are in charge of employment and the role of the state is weak.

The 2008 global financial crisis marked a turning point in this thinking. It put the state back in the driver’s seat to implement reform. It raised policy questions about the most effective means through which public budgets can generate and support decent work. There is a new momentum to take employment budgeting seriously.

The second reason that budgeting for employment policies is challenging is because employment cuts across economic sectors and is impacted by so many areas of economic and social concern: gender, age and environment issues, to name just a few. There are so many actors that need to be engaged in generating employment. It is hard to link up these sectors, issues and actors in a budget.

Ministries of labour need to have sufficient financial means to coordinate and implement employment policies with other key productive ministries. Sectoral ministries have to make employment a central and accountable target of their policies and budgets.

What is pro-employment budgeting?

Pro-employment budgeting means integrating employment into the national budget by looking at all government revenue and expenditures through an employment lens (ILO, 2014). In other words, a pro-employment budget is one that raises and allocates money to implement policies and programs in a way that moves towards the creation of decent work.
Pro-employment budgeting does not mean doing a separate budget for employment that would be managed by the ministry in charge of employment. Rather, this is an attempt to assess government priorities as they are reflected through the whole budget and examine how they impact employment. Pro-employment budgeting is not just about allocating resources for employment. It is also, and maybe primarily, about enhancing the efficiency of existing resources, by asking “How can we accomplish more and better employment with each dollar spent?”

Pro-employment budgeting does not mean looking at employment as the only priority in the national budget. Governments pursue various objectives, such as macroeconomic stability and growth.

**Integrating employment in the national budget does NOT mean to:**

- Show an interest only in employment
- Increase the share of the budget reserved for employment
- Set up a two-part national budget, one for employment, and the other for other national policies.

**Integrating employment in the national budget DOES mean that:**

All policies and all budgets of all state-run structures (ministries, national agencies, decentralised structures) integrate the employment objective.

Analysing the national budget through an employment lens can reveal discrepancies between what a government says it is doing and the actual resources it devotes to implementing policies on employment.
In brief, pro-employment budgeting is an effective tool to:

- Influence government spending and policies in favour of employment.
- Demonstrate inefficiencies in government spending and identify opportunities to reallocate to employment expenditures.
- Highlight the level of real government commitment to employment.
- Involve and empower trade unions to be a part of the budget process.
- Increase accountability and transparency of government budgets.

How do you do it?

Pro-employment budgeting is a relatively new process, and the tools for doing it are still being developed. Processes vary from region to region, but some good practices have been identified:

- Ministries of finance tend to allocate resources based on the quality of the request for funds. It is crucial to advocate for funds based on solid arguments. Be realistic and focus on measurable results and targets.
- Ministries of finance should be key partners when starting to develop a national employment policy. By its mandate, a ministry of finance can facilitate the integration of national employment policies into the budget. It can also provide methodological support on the procedures and give guidance on which interventions the national employment policy should focus on.
- Align the national employment policy on the priorities set out in the national development framework. Within a context of tight financial resources, not all elements of the policy can be addressed at once. Linking with the national development plan helps identify areas that are most politically acceptable to the government.
- Establish strong collaboration between the employment ministry and the ministry of planning and economy. Ministries of economy and planning are usually the leading structures of the national development framework and can best ensure coherence with the national employment policy.
- **Public expenditure reviews** provide a critical analysis of how effectively resources were used in the past and how they might be more effectively used in the future. They can be used to defend new spending proposals or convince the ministry of finance that past budgetary allocations were used efficiently. They can evaluate the amount of public funds that can realistically be earmarked for the national employment policy.
What role can trade unions play in the national budgeting process?

The budget document can help hold government accountable for its level of performance with the funds it receives. In many countries, there is a move from a bureaucratic and administrative culture towards a more open, accountable and citizen-oriented budgeting process. As a result, in many countries, the role of social partners in the budget process is growing or has the potential to do so.

**Consultation:** Trade unions can help ensure that employment features high in the public budget by being in the right place at the right time. Trade unions need to be acutely aware of the timetable of key budgetary discussions and events.

For example, the Government of Mauritius consults the social partners in the course of the preparation of the national budget. For three consecutive years, much emphasis has been laid on employment creation.

**Bringing independent analysis:** Trade unions can provide independent, critical analysis and new information to the debate.

In India, the non-governmental organization Samarthan undertakes budget analysis and monitoring of the country’s biggest employment program – The National Rural Employment Guarantee scheme. They undertook in-depth studies of the financial flows and analysed the budget data. They managed to identify bottlenecks and problems. They proposed solutions. For example, changing the way in which the funds were released resulted in fewer delays for the workers. The NGO also provides training in drawing up budgets for staff at the village level.

Each year in Canada, the Canadian Centre for Policy Alternatives produces an Alternative Federal Budget. It is a “What if?” exercise. For example, the 2014 Alternative Federal Budget shows what the federal government could do if it decided to seriously address Canadians’ largest social, economic and environmental concerns. It delivers a plan that would lift 855,000 Canadians out of poverty, reduce income inequality, boost the economy, lower unemployment to 5.4% — and balance the budget just one year later than the federal government’s plan. It demonstrates in a concrete and compelling way that another world really is possible.
Broadening the debate in civil society: Trade unions can help to disseminate budget information in simplified and user-friendly formats that most stakeholders can understand.

Kenya’s Budget Highlights 2011-2012: Citizen’s Guide is an example of a user-friendly document. It is easy to read and contains data, charts and short summaries of spending priorities. The six-page document includes useful pie charts that break down revenue sources, a simple table on macroeconomic indicators projected through 2013-14, and a diagram that provides both visual and numerical information about spending priorities. The document focuses directly on some of the key concerns of citizens: food insecurity, youth unemployment, social protection and infrastructure investment for faster economic growth.
3.6. Stage 6: Implementation – What role can trade unions play in making it happen?

Unions can set up and take part in the policy’s co-ordinating structures

*What does the coordinating structure look like for a national employment policy?*

Employment is a cross-cutting issue. It concerns many government ministries outside the ministry in charge of employment. It affects different levels of government (national, regional, local) and different actors, including workers’ and employer’s organizations and other specialized agencies. That makes it crucial to define a well-structured
framework for interactions among all the stakeholders involved in implementing the policy. Their roles and responsibilities must be defined.

Coordinating structures vary from country to country, but often share these features:

- A permanent structure at the national level provides steering and coordination for the implementation of the national employment policy. It is usually formally set up by legislation and is most commonly called an inter-ministerial committee or a national employment commission, council or committee. Its membership should be high-ranking to ensure sustained commitment at the top level of the political sphere. It should be tripartite, involving the ministry of labour and its social partners representing organized labour and employers. It should also be inter-ministerial, including in particular the ministries responsible for economy and planning, finance, and trade. Depending on the country, this body might also include representatives from the central statistical organization, university and research institutions, youth and women’s organizations, and others.

- To ensure effective co-ordination, the structure should be led by one of the most influential authorities in the country, such as the prime minister, a minister of cabinet, or the minister of economy or planning.

- The national structure is supported by an executive committee or secretariat, usually led by the ministry in charge of employment. This structure actually coordinates the implementation of the action plan and oversees the technical work. For example, it prepares progress reports for the inter-ministerial committee.

In Sri Lanka, implementation of the National Human Resources and Employment Policy is led by the Senior Ministers’ Secretariat under the overall guidance of a National Steering Committee. Subcommittees are set up for policy implementation. The Senior Ministers’ Secretariat creates public awareness of the policy and obtains feedback in order to refine and build up relevant strategies and action plans for implementation.

- Technical work groups or task forces can be set up to advise the national coordination body, produce policy briefs and carry out research on specific issues. In some countries consultative committees or groups have an information role in the implementation of the policy.
The USA President’s Council on Jobs and Competitiveness advises the President on the sustainable growth and competitiveness of industry and the labor force. Its members are appointed by the President and offer the diverse perspectives of the private sector; employers and workers. The council solicits ideas from across the country about how to bolster the economy. It reports directly to the President on the design, implementation, and evaluation of policies to promote growth, enhance skills and education, maintain a stable and sound financial and banking system, create stable jobs and improve the long term competitiveness of economy.

- The inter-ministerial and tripartite coordination structure at the national level should be completed by a structure at the regional or local level. That structure has the same function and composition as the national coordination structure, involving people who are acting more locally. It ensures that the NEP is anchored and implemented at the local level.

*Diagram of a coordinating structure*
CASE STUDY

Jordan: How the absence of the right coordination structure prevented the implementation of the National Agenda’s strategic approach to employment

In 2005, Jordan adopted its National Agenda which had its various pillars on employment and vocational training; investment; education; higher education; and social safety nets.

While these pillars allowed for a focused approach to each topic, the cross cutting issue of employment was tackled under ‘employment and vocational training’ but did not receive adequate attention under other pillars, especially investment which represents the demand side of the labor market. This could have been remedied had one of the main recommendations of the National Agenda, ‘to establish the Higher Council for Human Resource Development (HCHRD) Chaired by the Prime Minister’, been implemented. But it was not. Hence, the ability to coordinate across ministry between the demand and supply functions and provide continued guidance has been virtually absent.

For an issue as critical and cross cutting as employment, it is hard to see how coordination and guidance would take place without an umbrella structure which represents the supply and demand sides of policy making as well as the main stakeholders. The HCHRD would need to be supported by a small Secretariat which could be drawn from the National Center for Human Resource Development (NCHRD) to link up with the important monitoring or analytical needs on HCHRD.

Source: Hashemite Kingdom of Jordan, 2011
What role can trade unions play in building a successful co-ordination structure?

- Make sure that the national employment policy clearly describes every aspect of the coordination structure and how it will be set up, both nationally and regionally.

- Make sure that your roles and responsibilities as a social partner in the coordination structure are clearly spelled out.

- Push for qualified and experienced labour representatives at all levels of the coordinating structure. It is most efficient to engage the same actors who took part in the formulation process. The more you participate, the more experience and understanding you gain.

- Proposing existing structures that can be used to avoid institutional proliferation. If possible, link national employment policy coordination and implementation to structures that are already influential in the country.

In a number of African countries, steering committees were put in place to follow up on the Ouagadougou Summit. These committees could then be entrusted with the steering of the national employment policy. Another example of avoiding duplication is to use the ministry in charge of employment, which usually has a planning and policy department, as the executive or secretariat structure supporting implementation.

- Once they are set up, try to ensure that the coordination structure continues to function at all levels and to involve the social partners. Often, parts of the structure become a forum for dialogue only, or are seen as being needed only when an issue has to be dealt with (Harasty et al., 2012).
CASE STUDY

The role of the All-China Federation of Trade Unions in implementing national employment policy

The federation is one of the seven core members of the 21-member Inter Ministerial Employment Policy Council. The council is in charge of drafting policies, monitoring progress and reporting results. The other six core members are the Ministry of Human Resources and Social Security, the Ministry of Finance, the National Development and Reform Committee, the People’s Bank of China, the National Taxation Bureau and the National Administration of Industry and Commerce.

The All-China Federation is a main leader in conducting inspections and monitoring the national employment policy’s implementation. These inspections are required by the State Council once or twice a year. Several inspection and monitoring groups are organized to include the 21 members of the Inter-Ministerial Council.

Together with the Ministry of Human Resources and Social Security, the Ministry of Education and the All-China Federation of Women, the All-China Federation of Trade Unions organizes the Annual Youth Employment Promotion Campaign in May and the rural-urban migrant workers campaign in January.

The Federation regularly conducts its own special inspections and evaluations of the impact of the national employment policy implementation, generally focusing on disadvantaged, unemployed workers. The results are submitted directly to the State Council.

The Federation has its own Employment Services Centres and Assistance Centres for Disadvantaged Workers. These support national employment policy implementation by providing, for example, employment services, vocational training and micro credit services.
Unions should continuously collaborate with the ministry in charge of employment

This ministry plays a key role in coordinating the social partners’ contribution. It is the interface between social partners and influential ministries such as finance and economy that are traditionally not used to interacting with labour.

During the poverty reduction strategy process in Senegal, the ministry in charge of employment was absent from the process although it had been invited. Without their traditional champion to support, argue, and technically and politically validate their inputs with the public administration, the social partners’ room to maneuver was strongly limited. Face to face with the Ministry of Economy and Finance, it was difficult, because this ministry was not used to dealing with social partners (d’Achon, 2011).
Unions can develop tools for the inclusion of vulnerable groups in the process

**Informal workers**

Workers in the *informal economy* are usually excluded from labour law protection. In some countries, trade unions support these workers either within their own established organizations or by helping them to set up their own. Here are some examples:

**Establishing new trade unions**: In Peru, a 1992 decree introduced the possibility for independent workers to form organizations. In September 2006, the Latin American Confederation of Workers (Central Latinoamericana de Trabajadores) created a new federation of informal workers in Peru, which groups eight national unions of informal workers.

**Changing the status of existing trade unions to incorporate informal workers’ associations into the decision-making structures**: In Spain, an association of self-employed people across a number of sectors has been set up, with full voting rights in the trade union confederation.

**Establishing networks, partnerships or joint policy forums with informal workers’ networks**: The Bangladesh Home-Based Workers Association was established in 1995 and is now present in 64 districts with 18,000 home-based workers. It is affiliated to the International Textile, Garment and Leather Workers’ Federation and HomeNet.

**Youth**

Youth are another example of a vulnerable labour group. Social partners can promote youth employment by, for instance, developing and managing apprenticeship and vocational education and training systems, and by setting up training funds. Several Asian and African countries have tripartite involvement in their national human resources advisory councils. Tripartite involvement is strong in designing national skills certification systems in the Caribbean Community member states, in Chile, Malaysia, Mauritius, Singapore, South Africa, Sri Lanka, Tunisia, Turkey and many European countries.

In some European and Latin American countries, youth representatives are involved in the governance of national training systems (ILO, 2013b).
CASE STUDY

Working together to boost youth employment in Serbia

In Serbia, young people were particularly hard hit by the global economic crisis. Over a third are unemployed, and for those who have found work, one out of three are in temporary or informal, unprotected jobs. Often what they learned in school does not match what employers are looking for, making it hard for them to find a job.

To address these issues, the governments of Serbia, trade unions and employers, working together, have designed new policy interventions to give young people, especially those with low levels of education, a chance to find a decent job and keep it. With the support provided through a pilot project funded by Italy, Serbian trade unions prepared a training tool targeting young people most at risk for long term unemployment.

Italy’s funding also supports an initiative by Serbia’s National Employment Service, connecting young people with limited opportunities for education directly with employers, who train them on the job.
Unions can directly implement activities in the policy's action plan

Unions can be involved in implementation, for example, by:

- Supplying job training for workers
- Ensuring that specific problems of women workers and other particular groups are addressed
- Providing education and outreach on other workplace issues such as HIV/AIDS
- Providing outplacement counselling and re-training in the event of mass lay-offs or displacements of their members.

Comisiones Obreras, the main trade union in Spain, offers information, guidance, job searches and help with self-employment. It provides information and guidance to workers taking part in its own training courses, including identification of labour market opportunities, personal assessment, training opportunities, and job-seeking techniques (ILO, 2006).
CASE STUDY

Kyrgyzstan: The role of trade unions in the national poverty reduction programme

The Complex Principles of Development of the Kyrgyz Republic, the country’s national development framework, proclaimed the political and social wellbeing of the people of Kyrgyzstan as the common national goal for the period up to 2010. The first stage of implementing the national development framework was the National Strategy of Poverty Reduction. This strategy contained a complete package of activities, programmes, projects and research for the period up to 2005.

A presidential decree created the National Council and the Secretariat for the national development framework. Coordinating committees and 23 expert working groups were formed. Trade unions were part of these coordinating and working bodies. Large-scale preparatory work lasted for two years.

The Secretariat worked out a set of activities with implementation deadlines, funds allocated and expected results. Trade unions are among the actors. For instance, trade unions are responsible for the development of social partnership, the improvement of the legal basis, and staff training and retraining.

The Federation of Trade Unions of Kyrgyzstan contributed to the National Strategy of Poverty Reduction in the section on Building a Fair Society. The Federation helped to draw up proposals for the means test and the methodology for evaluating social standards.

It also helped to improve the mechanism for social support to offset increased energy costs, and it worked on a proposal for social passports for the needy, a scheme that would provide a more complete picture of poverty in different regions. Trade unions were also able to get their positions on
the raising of real incomes, wages and their levelling, and job creation incorporated into the strategy’s priorities.

Preparation of the strategy took place in a context of open and equal dialogue among partners. Conferences on its theory and practice were held, as were representative international seminars, round tables and consultations. These events included trade union participation, and others were held by the trade union organizations themselves.

The Federation of Trade Unions of Kyrgyzstan organized local training seminars for trade union activists, in which union positions were adopted and proposals were prepared. Regional trade union structures gave a good account of themselves when implementing the projects related to water supply, the rehabilitation of social and cultural facilities, and social mobilization. Trade union activists helped regional and district social workers to prepare social passports and poverty cards.


Unions can create parallel processes to support implementation

Trade unions can set up their own parallel consultative processes to advocate for their case more effectively or to ensure wider representation of interests. To be more efficient, however, policy advocacy needs to linked back into national forums.

When governments lack the political will to implement national employment policies, trade unions can play a role in keeping the policy alive. This is the case in Zanzibar, for example, where the national policy was languishing.
CASE STUDY

Zanzibar’s unions create a parallel strategy for decent work

Creation of productive and sustainable employment opportunities is at the core of achieving the goals of the long-term vision of Zanzibar. The Zanzibar Employment Policy of 2009 has the objective of stimulating national productivity to attain full and freely chosen productive employment in order to reduce unemployment, underemployment rates, and enhance labour productivity. The Zanzibar Strategy for Growth and Reduction of Poverty for 2010-2015 identifies employment creation under its first pillar on “Growth and Reduction of Income Poverty”.

The Zanzibar Trade Union Congress is an umbrella body representing workers formed in 2002 from a merger of nine unions in the region. At a workshop organized by the trade union congress and supported by the Danish Trade Union Council for International Development Cooperation in December 2011, participants lamented the lack of political will to implement the national employment policy.

In response, the trade union congress has prepared a trade union strategy on decent work and employment. It aims to give credence to job creation as a priority for poverty alleviation and social and economic development. The congress believes that the best approach to achieve decent work and promote employment in Zanzibar is through social dialogue.

There are several ways in which trade unions can contribute to decent work and decent employment in Zanzibar:

- Ensure freedom of association is respected and enhanced in Zanzibar. Freedom of association is a critical pillar for good governance and accountability and ensures the participation of working people through their trade unions.
• Enhance the capacity and strength of trade unions, through membership recruitment drives, effective representation and service provision to union members and workers.

• Engage in a systematic advocacy and lobbying campaign on decent work and decent employment in Zanzibar. More emphasis should be given to the role of women and youth in job creation, especially in the rural areas through local economic development, social economy and public enterprise initiatives.

• Ensure that collective bargaining is the most direct contribution of trade unions to job creation and poverty reduction.

• Promote the observance of trade union rights at the centre of economic prosperity.

• Support mechanisms for productivity improvement as a factor in job creation and improvement in the standard of living.

• Consider becoming major economic actors themselves through the establishment of labour-based enterprises.

Source: ZATUC/LO-FTF, 2011
3.7. Stage 7: Monitoring and evaluation – How do we know it is working?

**Monitoring** provides reliable data and useful feedback about the implementation of the policy. It is a continuous process that directly helps the stakeholders responsible for policy implementation in their work. **Evaluation** is an analysis of the monitoring data to determine if the policy is succeeding or failing, and why. It takes place at intervals over the life of the policy, often every five years.

Taken together, monitoring and evaluation are the mechanism for assessing whether the goals and targets of the policy are being achieved, the impacts it has had, and the nature of the challenges and constraints. They are tools for refining the policy and
developing future policies. They support the policy dialogue between the government and the social partners. They help the government to communicate about its policy choices and advocate for resources when the budget is being discussed.

Monitoring and evaluation tells you if you are implementing the policy right and if you are implementing the right policy. All national employment policies should contain a description of the monitoring and evaluation framework.

*Types of evaluation*

There are two types of evaluation that come out of the monitoring exercise. Process evaluation uses the information collected to explain why targets are being reached or not. Impact evaluation looks at outcomes. The well-being of individuals, households or communities and the effects of the programme are measured and compared to what would have happened without it. It is sometimes hard to measure these impacts because of other factors that might be affecting people’s well-being.

What is going on with the policy? Monitoring

Has the policy been implemented as expected? Process evaluation

What is the impact of the policy? Impact evaluation

When policies fail to have the intended effect, it is usually due to one or two types of failure. A theory failure occurs when the policy was implemented as intended, but failed to have the desired effect. For example, a country adopts measures to enhance education of young people to curb youth unemployment, yet youth unemployment remains high. The policy measures were implemented but no changes have occurred. The theory that youth unemployment is due to the low level of education may be wrong. Or, the policy may have had an implementation failure. For example, the education and training system that the policy put in place may not have responded to labour market needs, or may not have been accessible enough for youth.

The evaluation of the national employment policy should also look at:

- **Relevance**: Was the problem correctly identified? Were any important aspects overlooked? Was the logic of the intervention correct? Why or why not?
- **Effectiveness**: Have the planned results been achieved? Why or why not?
- **Efficiency**: Have resources been used in the best possible way? Why or why not?
**Intended and unintended impact:** To what extent has the policy contributed towards its longer term goals? Why or why not? Have there been any unanticipated positive or negative consequences of the project?

**Sustainability:** Will there be continued positive impacts as a result of policy once it has finished? Why or why not?

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**What are the elements of a good monitoring and evaluation framework?**

The NEP should clearly describe the framework that will be put in place for monitoring and evaluation. The monitoring and evaluation frameworks that are built into national employment policies vary from country to country, but they should include clearly assigned roles and responsibilities, reasonable time frames, realistic budgets, and an assessment of any barriers there might be to collecting data.

A monitoring and evaluation framework is sustainable if it is relevant, effective and efficient. Trade Unions should be vigilant and ensure this is the case.

The framework is relevant if it clearly defines who will be producing and using the information and what their needs are. There should be close links between the national statistics agency and the ministry in charge of employment.

The framework is effective if it produces information on time that can be effectively used in the decision-making process. It should establish the structure and timing of the information flows among the various stakeholders.

A monitoring and evaluation framework is efficient if it produces results at an acceptable cost.

Good monitoring and evaluation frameworks also tend to use “SMART” indicators to monitor targets. That means choosing indicators that are:

- **Specific**
- **Measurable**
- **Achievable**
- **Relevant**
- **Time-bound**.
What roles can trade unions play in monitoring the national employment policy?

Trade unions can play various roles, as both producers and users of labour monitoring information, and as watchdogs (ILO, 2012).

- Trade unions can contribute to debates on the priorities and results of monitoring and evaluation exercises. They can also work to ensure that there are linkages between the employment monitoring framework and the overall national monitoring system – for example, the national bureau of statistics.
- Trade unions can take part in the design of the monitoring and evaluation system by helping to choose realistic employment indicators.
- Trade unions can actually carry out monitoring functions and provide analysis and policy advice. Trade unions have a comparative advantage in certain types of monitoring.
- Where trade unions have research capacity, their independence is a useful contribution to policy analysis. Some systems also draw on independent research institutes, universities, non-governmental organizations and other social partners.
- Trade unions can do action-oriented monitoring. For example, they may wish to track the implementation of employment programmes at the local or enterprise level. Trade unions can monitor closer to the workers and directly intervene if programmes are not achieving their intended results. In difficult political environments, direct intervention may be less confrontational than producing reports critical of a government.
- Trade unions can disseminate information. In countries with low literacy levels, most workers can not access complex evaluation reports to find out whether a policy is working or not. Some trade unions have expertise in turning information into products suitable for a range of domestic audiences, for example through media and public education campaigns.
- Trade unions can report on and publicize concerns when there is a lack of consistency between implementation and the national employment policy. They can bring these concerns to the government when regular reports are prepared or when the action plan is revised.

Most national employment policy monitoring and evaluation frameworks include representatives of trade unions on their committees or working groups. However, in some political environments, trade unions may prefer to remain outside the system for fear of co-optation and control by the government.
CASE STUDY

Trade unions monitor the labour market in Russia

The global financial and economic crisis aggravated unresolved problems in the Russian labour market. The Federation of Independent Trade Unions of Russia decided to start monitoring the situation in the labour market. The monitoring system was organized in different economic sectors and in different regions of the Russian Federation. As of October 2008, it was undertaken weekly.

Information was provided by the primary trade union organizations, the central committees of sectoral unions and regional associations of trade unions. They gathered weekly statistics on the enterprises where problems in the social and labour spheres existed, which were then analysed weekly by the federation. This monitoring considerably supplemented the monitoring of the Ministry of Health and Social Development of the Russian Federation, because not all unemployed were taken into account by the government and local authorities.

Trade union monitoring paid particular attention to:

- dismissals
- wage reductions and wage delays
- delay of bonuses and other payments provided for in collective agreements
- employers’ refusals to conclude or prolong collective agreements
- the implementation of reduced working hours regimes
- work shutdowns
- the implementation of compelled holidays on the administration’s initiative
- credit rates applied by the enterprises
- the facts of credit refusals
- other problems frequently accompanied by violation of the labour legislation by the employer.
The results were presented for discussion in the Russian Trilateral Commission for the Regulation of Social and Labour Relations and in the Government Commission on sustainable development of the Russian economy.

Outcomes achieved

The trade unions insisted on the expansion of the government’s role in promoting employment. Measures to contain tensions in the labour market were developed in all regions of the Russian Federation and were implemented in 2009-2011. Financing of the activities came out of the federal budget, which made it possible to reduce the level of registered unemployment by 1.4 times from early 2009 to the third quarter of 2011.

In the Russian Federation overall, more than 5 million people were involved in various programs from the beginning of 2009 to September 2011. Activities included:

• vocational training of workers threatened with layoffs
• the organization of temporary and public works
• internships (on-the-job training) of graduates of vocational training institutions
• targeted support to citizens, including their resettlement to another location to fill jobs
• measures to promote small entrepreneurship and self-employment of unemployed residents.

The trade unions’ monitoring system aided the establishment of a working group on modernization of the mono-industrial towns in the framework of the Government Commission for Economic Development and Integration. The working group includes representatives of the government, the administration of the President of the Russian Federation, the state corporations and banks with state participation, institutes of development, and the Federation of Independent Trade Unions of Russia. Government support to the modernization of the mono-industrial towns helped to create new workplaces, thereby considerably reducing the rate of unemployment. In 2010-2011, from the list of 335 mono-industrial towns, 50 were selected to be supported by funds from the federal budget (35 in 2010 and 15 in 2011).
The data collected by the trade unions’ monitoring (for instance, data on the salary debts in the particular enterprises) helped to solve a lot of problems for enterprises with the help of the government. The trade unions’ monitoring information often reflected more specific data concerning particular enterprises than the data provided by the official statistics.

The trade unions’ monitoring system also enabled accurate short-term forecasting. This made it possible to quickly reveal problems in particular regions, sectors of economy and enterprises and to implement necessary measures.

It is necessary to point out that this monitoring was the only one in the country, which was not based on the information received from the employers.

*Source: Esaulova, 2011*
Three examples of frameworks for coordinating, implementing, monitoring and evaluating national employment policies

Country: Uganda

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<tr>
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<td>A high level National Employment Council with a membership at the Permanent Secretary or Chief Executive Officer level and drawn from different ministries, departments and agencies and social partners.</td>
<td>The policy states that Government shall take the overall responsibility for the implementation of the policy with the participation of other actors including the private sector, employers' and workers' organizations, development partners, non-governmental organizations, community-based organizations and individuals.</td>
<td>Monitoring and evaluation of the implementation and impact of policy measures at all levels shall be carried out on a regular basis using appropriate indicators. This will involve full participation of the government ministries, departments and agencies, private sector, workers' and employers' organisations and civil society.</td>
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<td><strong>Terms of reference:</strong> This Council shall guide and monitor efforts towards the implementation of the policy. It will identify priority areas for action; suggest ways for integrating the employment objective into all sectors of the economy; help raise awareness of different dimensions of the employment problem; suggest guidelines; and set employment targets.</td>
<td>The Federation of Uganda Employers and Labour Unions as social partners shall co-operate with the ministry responsible for labour and other relevant bodies in monitoring the achievement of the objectives of this policy and in dissemination. Both employers' associations and labour unions shall be encouraged to include a large number of members from small-scale unregistered enterprises, including employers with one or two workers and casual/seasonal union members.</td>
<td>No additional funding is foreseen. The financing of the national employment policy is spread over the line ministries, departments and agencies as well as local governments, social partners and civil society organisations.</td>
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Country: Jordan

The High Council for Human Resource Development will be headed by the Prime Minister and composed of members from the main ministries concerned with human resources and employment issues (education, higher education, labour, economy and trade), representatives of the private sector and labour unions, and specialized technical institutions.

Once established and fully operational, the high council will review quarterly reports and take necessary coordination action across ministries and public agencies. The high council will also review a yearly progress report prepared by the Implementation Team and present it to the Council of Ministers for approval if it involves changes to the Action Plan.

It is also proposed that the National Centre for Human Research Development become the Secretariat of the high council to ensure evidence-based policy making, providing timely information and analysis to decision makers.

The National Employment Strategy is envisioned to be completely updated every three years.

The Implementation Team will be composed of all ministries and public agencies in charge of implementing the various actions. The Council of Ministers has assigned the Minister of Labour to lead the Implementation Team and report to the Council of Ministers and the High Council for Human Resource Development (once established) on progress made.

The Implementation Team is envisioned to meet on a monthly basis with sub-teams or sub-project groupings on themes such as demand, supply, and institutional.

The Implementation Team would prepare a quarterly report on progress made against the timetable and indicators outlined in the Implementation Plan. The quarterly report would also outline any challenges or delays and propose ways to overcome them. Modifications of the project briefs and Implementation Plan would have to be presented to the Implementation Team and approved by the Minister of Labour. Any changes in the Action Plan would have to be submitted to the Council of Ministers for approval.

A small but highly professional Implementation Unit at the Ministry of Labour would be needed to support the Implementation Team.

Monitoring and evaluation at an institutional level takes place within two governmental units:

- The Government Performance Administration Unit at the Ministry of Public Sector Development
- The Delivery Unit in the Prime Minister’s Office.

The Government Performance Administration has helped align the national employment strategy’s performance indicators with those of the National Agenda and has provided the Implementation Team with an automated system to update progress on each action within. It has also provided extensive training to the team on monitoring and evaluation systems.

The Delivery Unit has uploaded the Implementation Plan on its publically accessible website and will produce a monthly report to the Prime Minister tracking progress on implementation.

Aside from this, there is currently no independent evaluation program in place for the national employment strategy. Such capacity needs to be developed in a sustainable way in a public agency which has considerable independence from the implementing ministries and agencies.

The National Centre for Human Research Development is the ideal existing agency to carry out this function, as evaluation of human resources and employment policies is within its mandate. It is also independent from any of the executing ministries. The centre would need to build evaluation capacity to carry out this role.

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<td>An inter-ministerial and tripartite Meeting was set up in 2003 to steer and coordinate the employment policy. It includes 21 members, including key ministries, the Bureau of Statistics, trade unions, youth association, women’s federation, disabled persons’ federation, industry and commerce association, and the governor of each province. The Presidency was first handled by the ministry of labour. As there was a lack of engagement of other ministries, the chairmanship was then given to the Vice-Prime Minister. This high level authority is key in getting all actors’ buy-in and commitment. The Assembly meets twice a year: once at the beginning to identify the annual action plan and once at the end of the year to review and evaluate the progress and implementation. The set-up of coordination systems at local level is provided by the employment policy law of 2008. Local levels have the same function as the national Meeting but at local levels. They include Vice-Governors, employment directors, social partners and representatives of key ministries.</td>
<td>The public employment service is the key implementing mechanism. All government levels have to identify employment targets and are responsible for achieving the agreed employment objectives.</td>
<td>The evaluation and monitoring system has five components: 1. <strong>Examination</strong> from top to bottom. This is conducted by the Inter-Ministerial Meeting in the name of the State Council, or by a local inter-department team in the name of local government to examine implementation progress and performance. 2. <strong>‘Social supervision’ from bottom to top.</strong> Governments at all levels establish a tip-off phone, website, mail box, and so on to receive opinions concerning employment issues from all corners of society. 4. <strong>Individual supervision</strong> is conducted by trade unions, the China federation of industry and commerce, and so on. 5. <strong>A pilot programme</strong> was launched in 2011 by the ministries of finance and labour. Sixteen indicators are identified to evaluate the national employment policy results, as well as government performance in management and use of the employment fund. Allocations of resources are linked with the monitoring and evaluation system to ensure that public spending is used to achieving the nationally and locally agreed employment targets.</td>
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</table>

References


— 2014. Pro-employment budgeting: How to link NEPs and national budgets (Geneva, forthcoming).


Zanzibar Trade Union Congress (ZATUC) and Danish Trade Union Council for International Development Cooperation (LO-FTF). 2011. Trade union strategy for decent work and employment. Developed at the ZATUC/LO-FTF workshop on employment strategy (Jambiani).
Resources and tools

African Labour Research Network: http://www.alrn.net/

Canadian Centre for Policy Alternatives: http://www.policyalternatives.ca/offices#sthash.MYL2J2Oi.dpuf


Video on Youth employment in Serbia: http://www.youtube.com/watch?v=Yn8ku-mtqel