

A.I.D. EVALUATION SUMMARY: -PART I

A. REPORTING A.I.D. UNIT: USAID/EGYPT  
ES#: 88-8

B. WAS EVALUATION SCHEDULED  
CURRENT FY EVALUATION  
PLAN?  
Yes  Slipped   
Ad hoc

C. EVALUATION  
TIMING:  
Interim  Final   
Ex Post  Other

D. ACTIVITY EVALUATED:

AFRO-AMERICAN LABOR CENTER:  
Grant No. 263-0125-G-00-8036-00.

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E. ACTION DECISIONS APPROVED BY THE MISSION DIRECTOR:

	OFFICER	COMPLETION DATE
Subject to GOE support for AALC continuation, consider new 4 year grant proposal which clearly specifies project objectives and monitoring and evaluation plan.	J. Wood, HRDC/ET	January 15, 1988

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F. CLEARANCE/APPROVAL OF EVALUATION SUMMARY AND ACTION DECISIONS:

Technical Directorate

A. Nassar, HRDC/ET *JW*  
J. Wood, HRDC/ET *JW*  
W. Gelabert, AD/HRDC *wrg*

Program Development and Support Directorate

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V. Kunkle, PDS/P *VK*  
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Deputy Director

C. Weden, DD *W*

Approved:

*MB*  
\_\_\_\_\_  
Marshall D. Brown, DIR

*12/13/88*

G. - EVALUATION ABSTRACT

1. Purpose: From 1983-1987, the African American Labor Center (AALC) with annual grants from USAID/Egypt and approval of the GOE, supported the Egyptian Trade Union Federation's (ETUF) requests for technical cooperation in workers' education and related fields. This five year assessment was conducted in Egypt by the Educational Development Center using available AALC and USAID data, documents, personal interviews and site visits to assess the impact of AALC activities to date and thus provide a rational basis for deciding about future USAID support for AALC activities.

2. Major Findings and Conclusions:

- o A rigorous assessment of the impacts of AALC activities was not possible with the data available in Cairo.
- o The AALC program in Egypt, as judged by a "qualitative and deductive assessment", is basically sound in conception.
- o AALC continuation under USAID funding is supported by ETUF leadership and by the GOE Ministry of Manpower.
- o Because the AALC's activities contribute to Egypt's political stability, their impact should be evaluated in socio-political as well as economic terms, by US Embassy policy staff jointly with USAID.
- o ETUF's Workers' Education Association (WEA) and the Workers' University (WU) provide the proper structure to meet Egyptian workers' and union leaders' educational needs. Educational programs are of sufficient quality and quantity.
- o Equipment purchases by AALC for ETUF were needed and are being utilized and properly maintained.

3. Key Recommendations:

- o AALC activities should continue to be supported by USAID/Egypt with Egyptian country program funds and multi-year grants synchronized to ETUF's four year election cycles under a new project design which distinguishes between purely developmental on the one hand, and relational and fraternal elements of AALC's activities on the other. Funding should be increased to cover elements in the new project design and growing number of workers reached by ETUF.
- o AALC and USAID/Egypt's education and population projects should collaborate (with funding provided through USAID project budgets) to extend support through the AALC to the ETUF and its WEA.
- o AALC should implement a self-evaluation and monitoring system which would help the project with internal efficiency and help to meet USAID's reporting requirements.
- o The focus of U.S. training visits and Egyptian curricula should be broadened to emphasize collective bargaining, management training, and women's labor education programs.

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H. Evaluation Costs

1. Evaluation Team	Contract # OR TDY Person Days	Contract Cost OR TDY Cost (US \$)	Source of Funds
Anthony Dawson John R. MacKenzie Abdel Moghny Said Salama (Education Development Center)	PDC-1109-I-00- 7118-00	\$22,887	Reserved funds from activity 0125

I. SUMMARY OF EVALUATION FINDINGS, CONCLUSIONS, & RECOMMENDATIONS

PROJECT DESCRIPTION: The African American Labor Center (AALC) is an affiliate of the AFL-CIO which has maintained a presence in Cairo since 1979. A principal aim of the AALC is to educate Egyptian workers and their leaders by responding to Egyptian Trade Union Federation (ETUF) requests for technical cooperation. From 1979-1983 AALC-activities in Cairo were conducted under long-range supervision from AALC headquarters in Washington, D.C. Beginning in 1983, an AALC coordination office was established in Cairo.

Since 1979 the AALC, with USAID funding and GOE approval, has supplied over \$2,000,000 and roughly LE 800,000 to support ETUF requests for: worker education programs; short and long term study tours to the US; equipment for the Workers' Education Association (WEA). AALC activities financed by USAID after January 1989 will be covered by a new proposal, project document and grant.

EVALUATION PURPOSE: Because of GOE and Mission reservations about the development impact of AALC activities in Egypt, USAID's continued support for this activity is in question. This threshold assessment was conducted to determine if future support should be provided and to make recommendations about its focus, magnitude and timing.

The evaluation methodology included: examination of USAID/Egypt files, AALC/Cairo files, background data supplied by USAID/Washington and AALC/DC; interviews with USAID, AALC, GOE, ETUF, WEA, WU (Worker's University) and donor group representatives; and visits to local institutions supported by AALC.

FINDINGS AND CONCLUSIONS:

(1) Project Continuation: The AALC project is providing worthwhile support to the Egyptian Trade Union Federation, but could benefit from a formal system for monitoring and tracking project activities. ETUF leadership and GOE's Ministry of Manpower support AALC's continuation with USAID funding.

(2) Context and Character of Project: Because AALC trains trade union leadership to deal with demographic and economic problems responsibly, its activities have the potential to promote socio-political stability and thus must be viewed in a socio-political as well as an economic development context.

(3) Impact of Project Activities:

Courses and Programs Sponsored with USAID Funds

Past record keeping omissions make it difficult to document the exact courses and programs sponsored by the AALC with USAID money. USAID has raised questions about course content at the grant approval stage on several occasions but there has been no follow-through in developing a reporting system.

USAID funds have supported educational activities at 53 workers' education centers distributed throughout Egypt. USAID funds have also supported training courses for instructors at the W.U. as well as specialized education provided through seven W.U. institutes: Workers Education; Labor and Management; Industrial Safety; Industrial Labor Relations; Social Insurance; Population Studies and Trade Union Studies.

WEA and WU have a trained competent staff which delivers programs of sufficient quality and quantity to meet trade union leadership's and membership's needs.

### US Training Visits

USAID provides the bulk of financing for US visits although there are other funding sources. Training visits include: ETUF officer visits to the AFL-CIO; local union leader visits to U.S.; long-term training leading to graduate degrees; training with counterpart unions. The five participants who were interviewed were positive about U.S. training. Fears that trainees would migrate to greener pastures appear unfounded.

### Equipment Purchases

Equipment purchased by AALC with USAID funds for the WU is appropriate, is being used (with exception of 1/3 of computers on loan with USAID approval) and is being maintained. Computers and language lab appear to have had a multiplier effect, e.g., other donors (British Council, ILO-Danida, Frederick Ebert Foundation) have plans to expand their use. At present the printing press takes in jobs from other trade unions for a fee and there are plans to increase revenues by expanding printing into a more commercial venture.

- (4) The Nature of the USAID/AALC Relationship: The relationship between USAID/Egypt and AALC/Cairo has not been good in past because:
- o AALC programs were not developed locally and were not Egypt-specific.
  - o ETUF has become increasingly independent from the GOE.
  - o U.S. Embassy opposed a full-time AALC representative prior to 1983.
  - o There were frequent personnel changes in U.S. Embassy, USAID, AALC and ETUF.
  - o USAID/Egypt was skeptical about the role of the labor sector in Egyptian economic development.
  - o The high turnover in ETUF's authority structure necessitated frequent repetitive training.
  - o An additional area of contention has been the "doctrinary" difficulties between USAID and AALC over language in project proposal documents.

### RECOMMENDATIONS:

#### (1) Project Continuation:

- o USAID should support a new AALC project with multi-year grants synchronized to ETUF's four year election cycle, based on a document that clearly spells out project goals and purposes.

- o Project funding should be increased to cover elements in the new project design and expanding ETUF membership.
- o The new project design should distinguish between "developmental" elements (amenable to reporting, monitoring and evaluation by USAID) and relational, fraternal, union-to-union elements which should be implemented by AFL-CIO/AALC without governmental supervision at close range.
- o Several activities in the areas of education and population (funded from existing USAID education and population projects) should be initiated:
  - to promote effective family planning among ETUF membership.
  - to encourage labor participation in planning and oversight bodies in education and training systems.
  - to use WEA as an instrument for promoting education in Egypt.
- o Recommendations for ETUF include:
  - Implement a 4 year occupational health and safety plan.
  - Offer manpower training on topics such as apprenticeship, vocational training, negotiating education and women's education.
  - Offer women's labor educator programs through WEA and WU.

(2) Context and Character of Project:

The impact of U.S. government funding for AALC should be evaluated in socio-political as well as economic terms by the U.S. Embassy policy staff jointly with USAID's development planners and economic analysts.

(3) Impact of Project Activities:

- o ETUF, WU and WEA should implement a comprehensive evaluation and monitoring system to help with internal project efficiency.
- o A developmental/utilization plan should be submitted by ETUF/WU to AALC and USAID at the time major purchases are approved so that they can be fully utilized more quickly when they arrive.
- o The courses and curricula offered in Egypt and on US study programs should include collective bargaining, management training, industrial engineering, productivity improvement and speciality training for worker education.

(4) Nature of the USAID/AALC Relationship:

- o AFL-CIO/AALC and ETUF should propose a "menu" of activities from which USAID can choose those for which it wishes to pay.
- o "Doctrinary" difficulties could be reduced by having AID/Washington retain a labor specialist to act as resource for labor-related programs and by requiring AALC project requests to be drafted with more emphasis on Egypt's development needs.

J. MISSION COMMENTS:

This evaluation falls short of demonstrating development impact of AALC activities. Mission staff feel that some conclusions were naive, some were based on too little data, and some were simply unwarranted. However, there is no strong basis on which to reject future funding, especially if the appropriate Government of Egypt ministries support the project's continuation and the AALC agrees to monitor and evaluate future USAID-funded activities.

(Lottie 1, AALC, 11/13/88 - 11/20/88 - 11/28/88)

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AFRICAN-AMERICAN LABOR CENTER

CAIRO

AN ASSESSMENT AND FORWARD LOOK

Report to the United States Agency  
for International Development, Cairo, Egypt  
September 1988

By:

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## I. EXECUTIVE SUMMARY

The African American Labor Center (AALC) is a region-wide AFL-CIO project befriending and assisting trade unions in Africa, similar to ALF-CIO regional projects in Asia and Latin America, all supported financially by USAID. This report by two Americans and an Egyptian in an evaluation mission from the Education Development Center, USA, looks at the AALC activities in Egypt: assesses past achievements, financed by five successive USAID grants from 1979 till now, provides information about the project and its context with focus on the present, and discusses and makes suggestions regarding USAID support for it in future.

The past activities were in Phase I from 1979 to April 1983, conducted under long-range supervision from AALC headquarters in Washington, D.C. The second phase started in April 1983 with the arrival of the first AALC Representative, who established a Coordination Office in Cairo to collaborate with the Egyptian Trade Union Federation (E.T.U.F.) and its Workers' Education Association (W.E.A.), including the Workers' University (W.U.). With the second AALC representative, who came in early 1987, Phase II draws to a close at the end of January 1989. This date terminates the total period covered by the five USAID grants to the project since 1979. Phase II closes then in the sense that further AALC activities financed by USAID have to be covered by a new project proposal (by AALC) and project document and grant (by USAID) to take effect on 1 February 1989.

In Phase I AALC project activities were ad hoc. There were considerable disagreements between and among the partners. However, in Phase II they developed a more business-like approach and were learning to work together. Much of the friction was dissipated.

USAID Egypt operates a country program under separate legislation from that of AID worldwide, which makes the USAID-AALC relationship unique there. The similar AFL-CIO activities elsewhere in Africa, Asia and Latin America are funded mostly by USAID's regional bureaus. Activities include union leadership exchange; attendance at international conferences; US study tours; technical assistance in worker education and trade union program development; provision of equipment.

Over the period Egyptian Trade Unionism has continued its growing independence from the government and this has changed the context in which the project is formulated, approved and implemented.

There has been considerable turnover of the persons concerned with the project in the US embassy, USAID, AALC, ETUF and WEA, yet USAID still has no labor officer in Cairo or Washington who could help with agency understanding of the project.

The repetition in the workers education and US visits programs is required because of the high turnover among union officers. Continuous funding of AALC is required. Better reporting would enable the changing staffs to understand and keep track of achievements and requirements.

The AALC is a limited purpose developmental agency with a continuing program working in the labor sectors of developing countries, on a union-to-union basis with USAID financial support. It serves jointly AFL-CIO, USAID and ETUF (with WU and WEA), overseen by the government authorities concerned on the two sides. The status of Egyptian trade unions vis-a-vis the government is in process of shifting over from that of unions in East European countries to that of unions in democratic western countries. This shift for ETUF, accompanied by shifts in the same direction in Egyptian political and economic life, and by Egypt's opening to the world economy, poses ETUF with difficult questions to resolve concerning its proper role in the changing society and polity. With the right answers, it can help to promote social stability through fairer sharing of the sacrifices and gains of development. In this situation, opportunities for ETUF officers and members to learn from the relevant experience of other countries and their labor movements, and from their teachers and their textbooks, are very timely and valuable. ETUF says that AALC's help is "absolutely vital", cannot be duplicated and that no other donor assists them in this way.

AALC also helps to broaden ETUF's trade union role in Africa, the Middle East and internationally.

The AALC is a social and an economic development project-not an investment project yielding large cash returns. It should be evaluated like an education project and also, in certain respects, in the same way as other US assistance to help Egypt maintain its socio-political stability.

The African American Labor Center was started by AFL-CIO in 1964. It has been carrying out the AFL-CIO policy of support for free democratic trade unions throughout the world, and here in Africa. "The AFL-CIO believes that free trade unions are vital to the process of economic and social development." The AALC carries out its program in Africa through 12 country representatives and one regional director for the 45 countries where it has worked including one in Egypt. AALC carries out its developmental and trade union support programs at "the request and with the advice of African trade union centers [ETUF in Egypt] and with the knowledge and cooperation of the host government." The AALC's overall development support falls in the following categories: worker education [42 of 45 countries]. Administrative support through grants, loans and equipment [equipment in 28 of 45 countries] and technical assistance, vocational training, medical and social services, cooperatives and credit unions, study tours and visitors [29 of 45 countries], communications and information, international programs and women's programs.

In Egypt over the past five project grants spanning a 10-year period from 1979 to January 31, 1989 the AALC and USAID-Egypt with the G.O.E. approval have supplied over 2 million dollars and approximately 800,000 Egyptian pounds supporting the ETUF requests for worker education programs, short and long-term study tours to the United States, for equipment for the Worker Education Association and for the development of the Workers' University. The latter Egyptian President M. Hosni Mobarak opened on May Day 1983. In addition other monies under impact aid were

utilized for special seminars, international conferences, Pan Arab and Pan African seminars and study tours. AALC with primarily USAID funds was able to supply a variety of worker education programs to provide training through the WEA's 53 training centers throughout Egypt, to train tutors that teach in the 53 centers either with its own funds or on occasion jointly with other international donors. It has also supplied more specialized education through the Workers' Universities' (five of the seven) specialized institutes that are primarily used for national and local officer training including those elected members of the Public or Private Enterprise Board of Directors, personnel and safety committees. Major AALC support has been given to institutional development of the new Workers' University. AALC has requested and USAID has supplied funds for about \$560,000 worth of equipment. The funds have purchased school buses, vans, printing presses, binding equipment, computer layout equipment, etc. to make WU's self-sufficient for printing its own educational text and to provide opportunity to do printing for ETUF or its 23 national unions. In addition AALC has supplied a language laboratory and computer laboratory as well as other education equipment to the W.U. Other international donors such as the ILO-Danida, the British Council for EEC, and the Frederick Ebert Foundation are assisting the W.U. to make use of the AALC purchased equipment and in other ways are assisting the Workers' University. U.S. support has not only led to institution building in Egypt but has acted as a multiplier. The W.U. is moving ahead rapidly with the completion of its administrative, classroom, library and laboratory

building, that is now operational, and its new residential center has been constructed but is not yet complete. This complex is designed to house 100 students that will study in the two two-year residential programs sponsored by the faculties on Labor-Management Relations and Labor Economics. In addition, rooms will be available for short-term seminars. The AALC with USAID support at the request of ETUF sponsored two Egyptian union officials and members of the WEA for study in the United States for a Master's Degree in Industrial Relations. One is now deputy director of the WEA and scheduled to head up the faculty in Labor-Management Relations. The other is now Minister of Manpower and Training for Egypt.

The trade union officers, including the President of WEA and two presidents of national unions as well as leaders of WEA, all felt that the short and long-term study opportunities in the U.S. were of great value to the Egyptian trade union movement as well as for their personal development.

Finally, the AALC with impact monies has permitted ETUF to take part in Pan African and Pan Arab trade union activities as well as to attend international trade union conferences and to make possible experimental conferences that permitted other Arab and African unionists to take part in these seminars.

AALC-USAID funding of the above activities has contributed to the worker education potential in Egypt that is fast completing a system which, once full-fledged, can serve Egypt's 2000 union officers and elected committee members and the 3.5 million union members.

The present mission could not conduct a proper evaluation of the project for 1979-1988 for lack of adequate and accessible data in Cairo. In lieu of this, the mission offers, in Chapter IV, a qualitative and deductive assessment of the project. In Chapter V and Appendix A it outlines a possible approach in future to proper evaluation and monitoring. AALC and the ETUF institutions it assists (notably W.U.) could benefit in future from more structured and computerized documentation and management information systems which could provide the data required to operate a self-evaluation and monitoring system. This would help the project with its internal efficiency. At the same time it would help to meet USAID's reporting requirements and secure USAID's full understanding and support for the project in the coming years. The evaluation system suggested is as follows:

The project document describes the project, its objectives, the resources to be used, the activities to be undertaken that will reach the objectives, and their schedule. It should be written to serve as a basis for evaluation as well as project planning.

The broad goals and the immediate and specific objectives of the project should be defined. The linkage between the objectives and the goals should be traced.

Monitoring tracks the timeliness, quantity and quality of the inputs and the outputs, with some indication of the cost-effectiveness of the project shown by the input-output ratios, activity by activity. Evaluation assesses the relevance of the inputs to produce the outputs, and of the outputs to serve as

objective- and goal-reaching, and evaluates the economic and social impact of the project.

Tacit assumptions and pre-conditions for project success should be, but may not be, stated in the project document. An evaluation can demonstrate the adverse impact on the project if the assumptions proved false or some pre-conditions were absent.

Proper preparation for evaluation calls for description of the base-line situation, done contemporaneously before the project starts.

The more technical and detailed elements in an evaluation system - time dimension, indicators of project inputs, outputs and economic and social impact - are presented in Appendix A.

We are convinced that the overall conception of the project is basically sound. It improves American relations with, and strengthens the capacity and effectiveness of, a very significant democratic force in Egyptian politics: organized labor. This is a rare opportunity for USA to reach almost directly to the grass roots of a country it wishes to befriend.

It will help if the workers and their leaders can be educated to understand better the economic problems and the structural and other reforms which should be accomplished for the sake of their future wellbeing. The chances of keeping Egypt reasonably united through the coming difficulties can be improved by the project, which costs less than 0.1% of the USAID's total annual program in Egypt.

We recommend that the courses and curricula of workers' education in Egypt, and the scope of the US visits and study programs, be broadened to put an emphasis on collective bargaining and to embrace management training and industrial engineering and productivity improvement studies as well as specialty training for workers' education.

We envisage that USAID and AALC might collaborate, if both sides so desire, to promote the implementation of certain other USAID projects which pursue goals of direct interest to the Egyptian workers. We recommend attention in this respect to the improvement of Egypt's vocational (including workers' educational) and training systems and family planning counselling and services units in large workplaces.

We recommend the implementation of the recommendations on a sound four-year plan for occupational safety and health made in May 1986 by an AALC consultant.

Regarding the magnitude of future USAID assistance to AALC we envisage some increase to provide adequately for the needs of the growing members of workers organised and reached by ETUF and the WEA. On the time period, we suggest a multi-year programming approach adjusted to synchronize with the phases of the four-year cycles between each "election time" period spanning several months in the fourth year.

We cite examples where more new equipment will probably be requested for the W.U. and allude to the (hitherto unused) possibility of financing some equipment through AALC from USAID's separate financial allocation to commodities provision.

"Impact" aid (contingency allocation for unforeseen needs) will be requested on an increased scale. Till now it has as a rule been used to serve useful developmental purposes.

We believe that the supply of additional textbooks is most important, and will have a high developmental impact relative to the modest cost involved.

We support the increased requests to be expected for trade union leaders and specialists to visit the U.S., because they serve the project's purposes - "fraternal" and "developmental"-respectively.

We support, as a factor strengthening the institutionalization of the project, the additional demand there will be for teachers and tutor training support in the WEA.

WEA will wish to benefit from how much can be learned by visiting U.S. unionists well versed in apprenticeship training, journeyman (women also), up-grading, vocational training, and negotiation of educational fringe benefits and education trusts. We trust that developmental benefit of these areas is self-evident.

Visits to Egypt by U.S. unionists and labor educators to give lectures to WEA may be requested and should be supported as a cost-effective way of transferring knowledge and fostering collaboration between workers' educators of both countries.

Women workers make up a good third of the ETUF membership and project activities to assist them and their leaders merit the full support of USAID.

The format and language of AALC project proposals, with the guidance of USAID concerning its requirements and essential questions to be answered, should be brought into line. USAID needs a labor adviser, at least in USAID in Washington, if not in its country missions as large as that in Egypt, to interpret and promote understanding of the labor movements of the developing countries.

Any remaining non-committed funds in the 1987-89 grant might well be drawn upon to expedite completion of W.U.'s accommodation for residential courses.

## II. INTRODUCTION

The AFL-CLO's African American Labor Center (AALC), a long-term regionwide project with several offices in different parts of Africa, conducted five USAID sponsored programs in Egypt successively from 1979 through January 1989. One element in the fifth and current program required that an evaluation of the five AALC project programs be undertaken. When the fifth program, whose launching was delayed, had achieved some accomplishments, USAID contracted the Educational Development Center Inc (EDC) of Newton, Massachusetts, U.S.A. to undertake the evaluation. (EDC is briefly described in Appendix B.) EDC's work was based on a scope of work developed by USAID in consultation with the AALC representative in Egypt, Mr. Michael O'Farrell, and Egyptian authorities concerned. (A copy of the Scope of Work is found in Appendix No. C).

The EDC hired three consultants to review and evaluate the USAID-sponsored AALC programs. The team leader from EDC was to be a general evaluation specialist with considerable experience in evaluation of international programs and knowledge of labor affairs. The second member of this team was to be an academic labor specialist, with knowledge of adult and worker education and program evaluation with international experience. The third member was to be an Egyptian with thorough knowledge of the

context in which the project is implemented. The three consultants meeting these requirements were, respectively, Anthony Dawson, Senior Associate, E.D.C., former Director of Evaluation, World Food Program, and Senior Economist of the International Labor Organization; John Mackenzie, Professor and Director of the Labor Studies Center, University of the District of Columbia, Washington, D.C., USA; and Abdel Moghny Saïd Salama, former Under Secretary of the Ministry of Manpower and Training, and former member and Director of the Workers' Education Association.

The first AALC projects had two beginnings and may perhaps have a third as a result of the follow-up to this report. The first period extends from 1979-1983. The second period begins in April of 1983 with the arrival of a full-time AALC representative to administer the AALC grants and to provide technical assistance in worker education to the Egyptian trade union movement. In the first period the AALC programs funded by USAID were ad hoc; this period was characterized by considerable disagreements between and among the partners. The second period appears to be one where the partners had begun to develop a more business-like approach and were learning to work together. However, some strain or friction has not yet been entirely dissipated.

The relationship in Egypt between AALC and USAID is unique. Perhaps this quality has emerged from the Middle East context and the fact that USAID Egypt operates under separate legislation from that of AID worldwide.

The USAID, on a country basis, in Africa and elsewhere, has had a long association in working with the AFL-CIO's overseas

institutes. The American Institute for Free Labor Development (AIFLD), provides education and training for workers and their unions in Latin American and the Caribbean; the Asian American Free Labor Institute, AAFLI, performs the same function in Asia and the African American Labor Center works similarly throughout Africa and the Middle East. All three Institutes receive the vast majority of their funding from USAID's regional bureaus. Most of the activities of the three institutes are essentially the same in each country although country-related. The three institutes provide worker education and training both within the country and overseas for its workers - based on country needs. They also give assistance in the development of cooperatives and credit unions. Activities include union leadership exchange visits through funding for travel and attendance at international conferences and meetings; U.S. study tours both long and short term; technical assistance in worker education and trade union program development; and the purchase of things that are related to worker education or union institutional needs: automobiles, educational equipment, class-room equipment, computers, printing equipment, etc. Despite this long history of cooperation and positive feeling between AALC and USAID in the three continents the relations between USAID Egypt and AALC failed to evolve in a good working atmosphere. Friction appears to have been caused by six internal factors, that we will comment on briefly.

First, the African American Labor Center is a subordinate institute of the AFL-CIO. Customarily, the AFL-CIO often receives program requests that are developed on the basis of discussions between trade union centers: the

ALF-CIO in the U.S. and the trade union centers in an individual country. In Egypt this would be the Egyptian Trade Union Federation. The recommended programs are then brought to the USAID-Egypt country mission for funding - a factor that stuck out as an anomaly in Egypt due to the AALC unique method of program development where its programs are not developed locally. The copy of the AFL-CIO-ETUF Agreement that permits union-to-union activity is provided in Appendix E of this report.

2. There is a long history of trade unionism in Egypt dating back to 1892 (see Appendix G) but the period from former President Anwar Sadat to the present President M. Hosni Mubarak is our period of concern. Egypt's unions have been given more independence under both these Presidents. Yet the move from being more or less an arm of the government to detachment and some independence has caused concern. The changes have not been far reaching yet the changes have presented challenges to the unions. One of the ways they meet the challenges is through the use of educational training for their officers and members.

3. In the period from 1979 to 1983 USAID was caught between pressures from AALC for program expansion and progress and the U.S. Embassy's apparent opposition to a full-time AALC representative being assigned to Egypt on political grounds. The embassy view seems to have prevailed right up to the time the first AALC resident came to Egypt in April of 1983.

4. One of the major trouble spots has been the constantly changing cast of players that dealt with each other over the life of the five USAID funded AALC programs.

- a. U.S. Embassy - three labor reporting officers
- b. USAID - six project officers
- c. AALC - four representatives
- d. ETUF - two Presidents and two secretary generals of the Workers Education Association.

The confusion caused by constantly changing personnel is obvious - especially without a standardized reporting system that could be utilized as part of the institutional memories among the parties.

5. There is confusion about the role of the labor sector in Egyptian development, and as a result, about AALC's program requests under the project. AALC programs are not "unique" or "one-shot" programs completed within a single funding term. Certain of their program elements continue in the requests from year to year - i.e. workers' education programs. They are written in Washington, D.C. in the same way as other AALC projects are formulated, often without explanation or being localized to Egypt. This was an area of concern to the Egyptian Government as well as USAID Egypt. More information could have been provided on how the project request contributed to the development of the labor sector in Egypt to justify requests by AALC. This is of particular importance to USAID-Egypt since they do not have a labor specialist in Egypt, nor does USAID in Washington have a labor specialist that USAID-Egypt could call upon.

Nor could the Embassy be easily called upon to assist as they have a part-time labor reporting officer, not a labor attaché, who, if experienced, in developing countries would be aware of the AFL-CIO Institute programs elsewhere. The reporting officers must concern themselves with many political things of which labor is only one.

6. AALC projects appear to differ from major USAID-funded project requests in most other subject areas. The same project item in the AALC field of worker education will be continuous, even if subject matter changes or remains the same. There are an estimated 7000 union officers and committee members that are elected every four years throughout Egypt between June and November in the election year. This causes a high turnover in the unions authority structure (about 30% every four years according to AALC and W.U. estimates) and this factor places an unusually high demand for repetitive education on union organization. Other institutions, except those affected by revolutions, coups, corporate takeovers or the like, do not have their leadership decimated on a regular basis. AALC will continue to ask for funds for labor education programs, for exchanges to enable Egyptian leadership to attend international and regional meetings, for long or short term study in the United States, and for observation visits to counterpart unions in the U.S. Only the item for things purchased will be unique to the project, but even here an automobile or computer or movie projectors may have to be replaced on occasion.

Because of the AALC's need for continuous funding of similar categories of developmental activities, it appears necessary to provide a means for USAID and Egyptian Government to evaluate what has been requested to better determine whether a makes sense both in the present and future: some form of agreed reporting needs to be developed so that new people from whatever side in the process, can plug into and make a decision. Each project should not be treated as it is new and final, never to be seen again. The overall categories will remain the same but the micro request will change.

The above six factors at one time or another seems to have caused their share of difficulty with the USAID-AALC relationship. Certain of these have solved themselves through experience; others are still part of the picture. We will come back to these from time to time as the report proceeds.

### III. CONTEXT AND CHARACTER OF THE PROJECT

In our attempt to understand the African American Labor Center, AFL-CIO and certain of the concerns that have swirled around it since it came to Egypt as a developmental agency, we felt it necessary to view it in a larger context. We hope that this larger view may provide some assistance in understanding the various roles the AALC plays.

The AALC is a limited purpose developmental agency in that it works with Egypt's labor sector. It is also a continuing agency in that it does not envisage to begin a project, complete it and leave the country. It continues year in and year out because it is based on the fraternity of all workers. It is the only agency in the U.S. that works with the labor sectors in the developing countries through this sector's leading organization, the trade union. AALC is itself a trade union-sponsored agency that works both on a union-to-union basis and, for financial reasons on a union - through USAID - to developing country union basis.

The AALC in attempting to carry out its functions in Egypt serves three administrative masters: the national AFL-CIO in Washington, because it is a subordinate international training institute of that organization; the United States Agency for International Development, that must review and approve its project submissions and reports and lastly, the Egyptian Trade Union Federation (and its Workers' University/Workers Education Association) that controls the requests for educational, technical assistance and equipment that AALC submits to USAID.

Behind the three primary parties, the two governments play their roles - the United States Government through its Embassy and the Government of Egypt through its various ministries related to Egyptian trade unions and AID project approval. The latter two in addition to their interest in the development projects with the labor sector both are interested in the trade union movement because of its political significance and potential - internally, nationally and internationally.

Within each nation there are laws governing trade unions that circumscribe their freedom of action and the activity they can or not carry out. Trade unions in the USSR, East Block, China and similar nations are arms of their State and carry out the state's interest and not that of the union membership in these countries - aside from social service functions. The unions are not democratic and they do not represent the workers' concerns. Trade unions in the West are less homogeneous and are characterized by few if any governmental restraints either on the union itself or how it functions and unions often go their own independent ways. This means they are occasionally at odds with their governments on domestic and international policy. Trade unions in Western Europe are often allied with a political party and are part of their countries' executive if that party comes to power, such as on those occasions when the social democratic parties in Germany or Sweden or the Labor Party in Great Britain have a ruling majority in their Parliaments. Trade unions in the U.S., although politically active, have no permanent political party affiliation. They still follow the dictates of their first President, Samuel Gompers, who coined the expression "reward your

friends and punish your enemies" politically. This means that labor will support those politicians of whatever party (so long as the party is democratic) who support labor's democratically arrived at policies.

Trade unions in Egypt operated within a system of more or less tight governmental controls under President Gamal Nassar whose systems of government were often patterned after the USSR-Eastern Block systems. With passage of time and the arrival of Presidents Anwar Sadat and M. H. Mubarak Egypt has moved down a more pragmatic road towards less government controls towards a more democratic, decentralized political system and a more mixed economy (see Appendix G).

These changes in Egypt present many questions for Egypt's unions. Several of the issues are now being discussed and investigated by them. They are concerned about their proper role as the country moves gradually closer to full democracy in a developing economic system. How will both the unions as an institution and their membership be affected by the changes and how should the unions respond? What issues will unions face as privatization moves ahead? The unions in Egypt are political organizations that must respond to the membership that elects them and in turn must interact politically with the nation's government on behalf of their unions. As individuals [as the trade unions state it] many of the union leaders play major roles in Egypt's Parliament - the People's Assembly.

As Egypt moves more and more into a world economy, its government is going to be increasingly affected by world market forces. This will mean planning to position Egypt to serve best

their nation's economic development. The same world market forces have forced changes on the almost closed economic systems of Russia and China and the open systems such as those in the United States and the countries of Western Europe - the latter are attempting mutual adjustment through their political and economic amalgamation in the European Community.

Unions, in countries where they are free to represent their members' interests, play many roles in their countries' political and economic adjustment and whether or not the roles are conducted responsibly often depend on the understanding of the changes, and the outcomes and alternatives that the union leaders have at the national and local levels. With few exceptions the best way to provide for union leadership understanding of development is through providing access to information through education programs, and exchanges of views with counterpart unions in the same industries in different countries, so that comparable methods and responses can be considered. This is particularly valuable in periods of economic change and in countries where multinational corporations are operating. Unions having adequate access to information can usually be counted on to assimilate it politically and to develop responsible policies that permit them to play a constructive role in their government's decision-making process. Without proper information provided on a more or less continuous basis, unions are often caught in the middle between the demands of their membership and demands of their governments for reform. In those situations where economic belt-tightening is required there may be several undesirable effects. Unions can respond through economic direct

action - strikes whether outlawed or not. Workers the world over will wildcat (strike without their unions blessing), or current responsible knowledgeable leadership may be turned out of office and a more radical, less experienced trade union leadership may gain power. This in turn will often pit the union and its membership against the government, making necessary reforms impossible. In the extreme, the government may impose serious restrictions on trade union rights or the use of force against the trade unions.

The AALC plays two roles in Egypt. First, it administers funds provided by USAID. Approximately ten percent of the education programs that are provided by the Workers' University/Workers Education Association (primarily through the Workers' University Institutes) are based on AALC funding. The AALC, and other donors such as the I.L.O. and DANIDA (Danish Aid), European Community, and the Frederick Ebert Foundation, all assist with the education programming and capacity expansion of the Workers' University. AALC like other donors respond to ETUF's request for aid.

Secondly, however, "the AALC is the only developmental donor agency in Egypt that assists with trade union development." This, in the words of the ETUF's assistant director for international affairs, is "absolutely vital to ETUF." They consider that the support activities of AALC to their programs cannot be duplicated and no other donor assists them in this way. They are firm in their belief that union-to-union support such as sending Egyptian union leaders to the United States and elsewhere is necessary. They also feel that it would be helpful to have

more U.S. union leaders come to Egypt to discuss issues of mutual concern. But they hasten to add that this would be in addition to, not in place of, Egyptians going to the U.S. for college degrees, study visits and counterpart visits or group observational visits.

They also feel the special opportunities that AALC, in partially funding a specialized education support, have been more than useful. It has permitted Egypt to use the Workers' University to play a major role in both Pan Arab and Pan African trade union activities through education. This appears to be a field of activity that ETUF wants to continue to expand with AALC assistance. They already have trips planned to the U.S. for the new director of the Workers' University, Dr. Emad El Hassan, who is coming to the U.S. in November to review workers' education. He will be accompanied by the new Principal of the Tom M'boya Labour College in Kenya - an example of international outreach. There are also joint programs underway to bring several unionists African - Arab and non-Arab - to come to Egypt for education. In addition the AALC Project funds have been of great assistance to help Egyptian unionists go to various international meetings in Africa and elsewhere. This permits Egypt's unions to expand their trade union role both on the continent and in the world at large.

In this capacity we see the AALC playing a necessary role somewhat beyond that of provider of education and technical assistance to education but one of broadening the Egyptian trade union role in Africa, the Middle East and internationally. This in turn permits Egypt's unions to play a larger role beyond

its borders and in part to assist the government of Egypt as it begins to play a larger role among the Arab nations and in the continent of Africa. The AALC's dual role can be seen as its supplies special education seminars, travel funds and other support for Pan Arab or Pan African meetings and seminars needed by the Egyptian Trade Union Federation.

As we approach, in our next chapter, our assessment of the project, we trust that our remarks here on the context of the project have underlined the fact that this project is not simply an economic or "economic development" project, and cannot be justly or accurately assessed by economic evaluation techniques. When we asked some of the USAID officials we contacted what indicators they would use to measure how the AALC project has promoted "progress" and "development", they mentioned increases in Egyptian production and in labor productivity. The linkage between these and the project activities is indirect and measurable, if at all, only negatively. Were there to be greater political instability, opposition to needed economic reforms and spreading labor unrest and "working to rule", due to poorly educated and ill-informed trade union leadership, there could be a significant fall in Egyptian production. Positively, if as stressed to us by the Minister of Cabinet Affairs the skill composition, motivation and adjustment to demand of the country's manpower were to be up-graded by a reformed and re-vitalised education and training system, with the full understanding and support of the labor movement, the productivity and employability of Egypt's workers could be substantially increased. Such a revolution, however, depends largely upon much more costly

levels. The very dynamics of the investment in Egypt's economic expansion will make foreign exchange all the scarcer. The uses of it will have to be strictly rationed.

So the main conclusion of this chapter is that, insofar as U.S. Government financial support to the AALC has to be channelled through USAID, it should be evaluated in socio-political as well as economic terms, by the U.S. embassy policy staff jointly with USAID's development planners and economic analysts.

#### IV. ASSESSMENT OF THE PROJECT

##### Overview

The E.D.C. team, in its attempt to follow the Scope of Work (Appendix C) that was developed by USAID-Egypt and AALC to assist the evaluators to review and evaluate the five USAID-Egypt funded AALC projects that spanned a ten year period from 1979 to 1989 [1/31/89 being the ending date for the final funded project], reviewed all records made available to them in Egypt. The records came from three sources:

1. USAID-Egypt files at Cairo Center
2. THE AALC files at their Maadi office
3. Background information that the team brought with it to Cairo - supplied by USAID and AALC-DC to EDC (the evaluation contractor).

The files at both USAID-Egypt and at the AALC office were far from complete. What could be found was willingly turned over to the team for review or for copying so the files would remain intact. However, without the availability of complete files in the individual projects it was necessary for the team to piece together much of the information through the interview process. In many instances the correspondence files at USAID provided much of the information needed or indicated where we might obtain additional information. This was somewhat time consuming for a short term evaluation but this was the only available method.

It should be noted that there was no single or group of institutional memories at USAID, AALC, ETUF or the Workers' University. The principals from each were all somewhat new to

their positions and had been involved less than two years with the projects. Therefore, without adequate files and institutional memories available to respond fully to the Scope of Work, this report will have to be developed without the numbers that might be necessary for a more comprehensive micro analysis on a project by project basis. There was enough data, correspondance and persons interviewed to supply sufficient information for macro analyses which are a vital part of the scope of work. We have attempted to fill in micro data where available and pertinent.

We found the issue of files location bound up in the issues of past project approval difficulty brought on by the unique AALC - USAID-Egypt relationship, and the number of parties involved in project design and approval. As already noted, AALC-Egypt is a part of a continent-wide worker education and training institute for trade unions that normally conducts its project planning, development and project drafting at its headquarters office in Washington, D.C. The AALC office in Washington reconciles its dollar account (its Egyptian pound account is reconciled by USAID-Egypt). All receipts or vouchers covering expenditures or purchases or tutor costs that are supplied by the Workers' University or elsewhere in Egypt - covering the AALC program segment are sent to AALC-Washington by AALC-Egypt. In addition the AALC representative sends his activity reports to Washington. Therefore, the best source of records would be in Washington, D.C. USA - not in Cairo, Egypt. If the project required more micro analyses with number crunching it would be necessary to be completed in Washington at AALC.

We are grateful to the persons we contacted (listed in Appendix G) for information, largely qualitative, additional to that which we could obtain from the documents, which helped us to formulate this report and especially this chapter.

First, to give the reader an overview, we present the following summary of AALC project activities in Egypt since the onset of USAID funding.

#### 1979-1980

Under an AID grant negotiated in 1979, the AALC provided the ETUF with office equipment, vehicles, and educational materials. The next year saw the strengthening of ties between the Egyptian Trade Union Federation (ETUF) and the AALC.

Early in 1980 an official delegation representing the ETUF first visited the U.S. This was followed by the visit of the then ETUF Workers' Education Association director to look into a proposed program to train labor educators in the U.S. During the summer, the AALC welcomed vacationing ETUF President Sadd Mohamed Ahmed and his family. In September, a five-man delegation representing the Egyptian federation visited the U.S. as guests of the AALC.

AALC's representatives likewise traveled to Egypt. In February, 1980, AALC's executive director, accompanied by Wisconsin State AFL-CIO President John Schmitt, attended the ETUF Executive Council meeting in Cairo. AALC Program Officer Robert Richter visited Egypt several times to assist in drafting a five-year education program.

The program was submitted and approved in 1980. It provided for an industrial safety and health study, labor education programs in the U.S., and visitor exchange programs during 1981.

#### 1981 - 1982

Cairo was the venue of the AALC's 1981 annual staff conference. While there, representatives from the AALC (Washington) and the ETUF signed an agreement in which the AALC would provide Egyptian trade unionists technical assistance, training in the U.S., and programs in occupational safety and health.

1981 was marked by an exchange of visits by the top trade union leaders of the AFL-CIO and the ETUF. AFL-CIO President Lane Kirkland made his first official visit to Egypt in April and President Saad Mohamed Ahmed attended the AFL-CIO's 13th biennial convention in November.

The AALC organized two 14-week study programs in the U.S. for 12 Egyptian labor educators which the AALC described as successful. The educators, all from the ETUF's Workers Educational Association (WEA) studied labor economics, industrial management, public relations, collective bargaining, occupational safety and health, trade union administration, co-ops and adult education techniques. Courses took place at the New York School of Industrial and Labor Relations at Cornell University and the School of Workers of the University of Wisconsin.

Participants: March-June 1981

1. Saad Abdel Aleim Omar, Dean, International Relations, WEA
2. Elsayed Mohammed Elhelw, Director, Tanta Workers Educational Center
3. Khalil Ali El Wardani, Director, Talaat Harb Workers Education Center in Alexandria
4. Samy Mohamed Abdel Khalek Eid, Instructor, Monof Workers Educational Center
5. Abdel Salem Mohamed Ahmed Bonnah, Manager, Workers Education Center in Suez
6. Mohammed Elgendy, Director, Cultural Training for El-Nasr Automotive Association, and Instructor, El-Din Center in Cairo

Participants: (June-August 1982)

1. Mokhtar Abdel Hamid Hassan, Dean, The Institute of Social Insurance (WEA)
2. Ahmed Abdel Salam Ahmed, Assistant Dean, The Institute of Social Insurance (WEA)
3. Hussein Abdalla Hussein, Assistant Dean, The Labor Institute (WEA)
4. Kamel Ahmed El Abd, Manager, Workers Education Center in Zaitun
5. Eleish Ali Fouad, Director, Cairo Region (WEA)
6. Emad El Din Hassan Ibrahim, Dean, Giza WEA; Assistant Director, WEA's Research Department

Two ETUF/WEA candidates for an M.A. in Industrial Relations completed language training at the American University in Cairo and were enrolled in a program of studies at Wayne State University in Detroit, Michigan. These are Asem Abdel Haq Saleh, Assistant Director of the Workers Education Association, and Abdel Salam Ayad, Director of the WEA's Labor Management Institute.

In July 1982, the AALC arranged a two-week session in hotel training for two officials of the Hotel and Tourist Workers Union of Egypt. Training took place at the School of Hotel Administration, at Cornell University. These were: Ibrahim Mustafa, president of the Hotel and Tourist Workers Union; and Semir That Askalani, vice-president of the same union. Mr.

Mustafa, who is also assistant-treasurer of the ETUF and a member of its executive board, took courses in computer application in the food service industry and market selling. Mr. Askalani's courses were in sales in resorts and various aspects of tourism.

A group of top officials from the Egyptian Trade Union Federation (ETUF) came to the U.S. in June at the invitation of the AFL-CIO to better acquaint themselves with American labor leaders as well as with the American labor movement and its role in advancing the economic and social interest of American workers.

Participating in the two-week program were:

1. Ahmed Elemmaoui, President, General Union of Oil and Chemical Workers of Egypt
2. Mokhtar Youssef, President, General Union of Education of Egypt
3. Saaid Gooma, President, General Union of Metal Workers of Egypt
4. Galal Zeeid, Staff member of the International Affairs Department, ETUF

The United Food and Commercial Workers International (AFL-CIO) organized a training seminar for the executive board and local presidents of the Egyptian General Trade Union of Commerce Workers.

The AALC arranged the purchase and installation of translation and audio-visual equipment at the WEA. In addition, office furnishings such as calculators and typewriters were purchased.

An AALC team conducted a feasibility study on developing a program of occupational health and safety. This study led to a seminar held in March '82 which explored possible ETUF activities in occupational health and safety.

ILGWU/AALC cooperation provided the Egyptian trade union movement with x-ray equipment; the ILGWU donated the equipment and the AALC paid all freight charges.

### 1983

The productive relationship between the Egyptian Trade Union Federation (ETUF) and the AALC continued to grow in 1983. The AALC posted a representative in Cairo early in the year. Peter Loebarth, AALC's former representative for West Africa, assumed this position.

Trade union elections were conducted in 1983. President Saad Ahmed and his colleagues were re-elected to serve until 1987. Involvement in the elections activities, however, slowed down progress in union education programs.

May 1 marked the opening of the ETUF's Worker University. Egyptian President Hosni Mubarak officiated at the ceremonies. Egyptian government and labor officials, along with trade union delegates from 12 countries attended. Thomas W. Gleason, chairman of the AFL-CIO International Affairs Committee, and General President of the International Longshoremen's Association, and Patrick O'Farrell, Executive Director of the African American Labor Center, AFL-CIO, represented the American labor movement. The AALC made substantial contributions toward the realization of the Workers University. In addition to providing buses and equipment, the AALC sent Abd El-Salem Ayad, director of the Labor and Management Institute, and Asem Abdel Haq Saleh, ETUF secretary for Workers Education and Training, to Wayne State University in Detroit, Michigan, for a Master's degree in labor

and industrial relations. One of them is now serving as vice principal of the university; the other is Minister of Manpower. The AALC also assisted in the preparation of the school's curriculum.

At the request of the ETUF, the AALC started a trade union health and safety program. In 1983, the mining, construction, and textile unions were targeted for such assistance. Egyptian experts were trained by U.S. counterpart unions. American experts will visit Egypt in 1984 to help set up health and safety units within counterpart unions.

The Workers Education Association and the AALC ran two seminars, one on health and safety and the other on workers education, for 60 union members of the Communication Workers of Egypt.

Three seminars were held for the ETUF in collaboration with the two Sudanese trade union federations as part of their labor movements endeavors to carry out the goals of the Charter of Integration signed by Egypt and the Sudan in 1982. Two seminars held in Cairo treated labor legislation and the role of trade unions in development. A session for trade union women took place in Alexandria. (This is one of the rare references in the project documents to women from any source).

#### 1984

In 1984, the AALC program of assistance continued to aid the development of the Egyptian Trade Union Federation (ETUF) and its 23 affiliated unions. Through this program, AALC said, the ETUF continued to develop a capacity for participation in national

development and deal more effectively with problems of collective bargaining in the expanding private sector. It also strengthened existing trade union structures in general workers education, research and curriculum development at the Workers University, and the development of safety and health conditions in selected industries.

In 1984, the following activities were undertaken:

- Eighty seminars for trade union leaders were held in conjunction with the AALC. These sessions were held in Cairo and Alexandria for participants from all parts of Egypt, and AALC said they greatly increased union leadership skills.
- Two ETUF health and safety experts participated in a three-month training program in industrial health and safety in the U.S.
- The following members of the ETUF executive council traveled to the U.S. and observed AFL-CIO and American union operations:
  1. Kamel Abd El Awaad, Vice-President, Union of Commercial Workers
  2. Abdel Fattah Badr, Vice-President, Services Employees Union
  3. Rifaat Elhagrasy, President, Social and Administrative Services Union
  4. Mohamed Gamal Emam, Director, International Affairs, ETUF
  5. Mohamed Khairy Hasem, President, Communication Workers Union
  6. Ahmed Khalil, Vice-President, Chemical Workers Union
  7. Abbas Mahmoud, President, Mine and Quarries Union
  8. Mohamed Moar, President, Union of Construction and Wood.

- A language laboratory was sent to the Workers University and installed by American experts.
- A trade union leadership seminar for ten Somalis, five Eritreans and ten Egyptian trade unionists was held. An American trade union leader from the Postal Workers Union directed the session.
- In addition, by working through the U.S. counterpart union, equipment, seminars and a U.S. study tour for three officers were provided to the Communications Workers of Egypt; three seminars were held for the Commercial Workers Union; and training in the U.S. was provided for the president of the Hotel Workers Union.

The workers education instructors who were trained in U.S. labor schools have greatly increased the quality of labor education in Egypt. The two lecturers at the Workers University who obtained MA degrees in Industrial Relations at Wayne University in 1983 were reported by AALC to be now playing a crucial role in developing the curriculum of the University. The federation's industrial health and safety program, was according to AALC, beginning to make an impression on trade unions' participation in health and safety programs at the work place.

#### 1985

In 1985, 70 one-week seminars were held by the ETUF's Workers Education Association in Cairo and Alexandria. Approximately 2,200 union members chosen by local trade union factory committees participated. The AALC also helped the ETUF

organize three special seminars in Cairo: one for Sudanese trade unionists, one for English-speaking African trade unionists, and one for Arabic-speaking trade unionists.

Ten out of 13 provincial federation presidents traveled to the U.S. for a two-week observational study tour:

1. Salah Moghazi, Chemical Workers Union
2. Mahmoud Abdel Al-Ahmed, General Union for Food Industries Workers
3. Mohamed Moussa Hassanein, General Union for Food Industries Workers
4. Mohamed El-Fooly Sherif, General Union of Railway Workers
5. Kamal Abdel-Khalek, General Union for Land Transport Workers
6. Ahmed Radwan Ahmed El Shazly, General Union for Commerce Workers
7. Sayed Hassan Darwa, General Union for Food Industries
8. Abdel Fatah Hassan El Bana, General Union for Textile Workers
9. El Sayed Mohamed Rashid, General Union for ATextile Workers
10. Abubakr Gadel Mawla, National Union of Health Workers and Egyptian Trade Union Federation

Fifteen computers and printers were purchased for the Workers University and training to operate them was provided to the school's instructors and administrative staff as well as to union officials.

Two ETUF health and safety experts participated in a training program in the U.S.:

1. Ali Abdel Hamid Abas
2. Abdel Rahman Hassanein

A lecturer at the Workers Educational Association was enrolled in a Master's degree program in labor studies in the U.S. Because of personal reasons, the student returned to Egypt before finishing the program.

The president of the Egyptian hotel workers union and the president of the communications workers union were sponsored to take part in international conferences while the director of workers education was sponsored on a tour of trade union education facilities in three other African countries.

### 1986

In 1986, 27 one-week seminars were held by the ETUF's Workers Education Association in Cairo and Alexandria. Approximately 700 union members chosen by local trade union factory committees participated.

In May, an AALC Consultant in occupational safety and health, Lynn MacDonald, visited Egypt and made recommendations for a Four-Year Plan of an Occupational Safety and Health Program. This was included in AALC's proposal to USAID later in the year for its new overall program for the whole period 1987 to 1990.

Thirteen senior trade union officials traveled to the U.S. for observational study tours:

1. Said Gomaa, President, The Engineering Union
2. Ibrahim Shalaby, President, The Textile Workers' Union
3. Ahmed Abdul Latif, General Secretary, The Health Workers' Union
4. Ibrahim El Azhary, Treasurer, The Chemical Workers Union
5. Hussein M. Hassan, Assistant Director, Department of International Affairs, ETUF
6. Ahmed El Amawi, President, General Trade Union of Chemical Workers
7. Abdel Sattar Saad, Vice-President, General Trade Union of the Food Industries Workers
8. Soliman Edris, Vice-President, General Trade Union of Engineering Industries Workers
9. Ismail Mahmoud Mishrif, Vice-President, General Trade Union of Postal Workers
10. Mohamed Kamel Labib, General Secretary, General Trade Union of Land Transport Workers

11. Hassan Eid
12. Ahmed Dimallawy
13. Saad Ahmed

An ETUF health and safety expert participated in a training program in the U.S.

#### 1987-1989

In 1987 there were the union officer elections which come every four years. The major change was the election of a new President of ETUF and the appointment of separate individuals to the leadership of the Workers' University and the Workers' Education Association. The Representative of the AFL-CIO and head of the AALC Coordination Office in Cairo, Peter Loebarth, was transferred and replaced by Michael O'Farrell.

The AALC's proposal for a new multi-year program for the period 1987-1990 had been submitted to USAID but its consideration by the latter was held over because the fifth grant annual program, to be implemented in 1987, was not allowed to proceed by the government ministries concerned, though USAID/Cairo addressed written requests to all three for approval. It was accorded just in time before the end of 1987 to permit USAID reimbursement of the cost of the AALC Coordination Office in 1987 and to transfer to 1988 the remainder of the 1987 USAID program funds. Documents were signed with the government to cover completion of this program by the end of January 1989.

During 1988 a project evaluation was to be carried out as a response to, and as a basis for dealing with, the AALC 1987-1990 program request. Such an evaluation for this purpose was not held in 1987, because there was then practically no project

activity. The agreements transferring the 1987 program funds to 1988-89 specifically included the evaluation, to be charged to them. The present evaluation, in September 1988, was organized once the customary project activities of previous years had resumed t pace, and just in sufficient time, before 1 February 1989, to take appropriate action on any revised AALC project proposal (including this mission's proposals) for a subsequent period.

USAID/Cairo explained to the mission that the viability of the AALC in Egypt was in question and that a rational basis was required for a conclusion regarding the relationship between AALC and USAID in Egypt and the desirability and possibility of continuing the project.

In September 1988 the new President of ETUF visited the United States and had meetings with the President and other officers of the AFL-CIO.

Other recent AALC activities (in 1988) are mentioned below in this chapter.

In the following sections we present our assessment of each of the ~~main~~ branches of activity in the project.

### Education and Training for Egyptian Trade Union Leaders in the United States

Education, training and observational trips to the United States are one of the most valued forms of education in the eyes of the trade union leadership in Egypt. The ETUF felt that exposure to another, more open system of national unions with somewhat different structures and procedures has permitted the

Egyptian unionists to incorporate many new ideas and functions within their own unions. This is the judgement of two Presidents of General Unions - the Postal and Hotel Workers Unions. They felt that their trip helped them with both educational and institution building, which is a main concern of ETUF and its Executive Board that is composed of the heads of all twenty-three national general unions.

Based on our review of the available records at the USAID Cairo Center, those at the AALC office in Maadi and the interviews conducted there appears to be five types of AALC sponsored education and training visits to the United States. Although USAID provides the lion's share of financing there appear to be other forms of financing for the educational trips such as USIA, the U.S. Embassy, U.S. national unions or AALC funds or those that come through the AFL-CIO from the National Endowment for Democracy.

The five types of international education and training programs in the U.S. are as follows:

1. Visitation by General Officers of ETUF and the general officers of the National Unions to the AFL-CIO and other U.S. national and international unions.
2. Visitation by union leaders from a variety of local unions, regional organizations or top offices in national unions other than the chief executive of that union.
3. Long-term training leading to a graduate degree at a U.S. university.

4. Education and training with counterpart unions - such as Egyptian Commercial Worker visitations to the United States, United Food and Commercial Workers Union or Postal Workers to Postal Workers Unions.
5. Individual Egyptian Trade Union leaders taking part in the long term (three week plus) union education programs such as those operated on a pan-African basis co-sponsored by the AALC, the George Meany Center for Labor Studies and the Labor Studies Center of the University of the District of Columbia for anglophone and francophone African union leaders. Egyptian union leaders have taken part in the anglophone programs.

Based on interviews with five persons who took part in the courses of education and training in the U.S. all were very supportive individually. All said it had a positive impact on their job as a union leader and all who went to the U.S. were still with their unions. The review team was somewhat concerned that those trained in the U.S. might leave the union for "greener pastures" in private business or government or non-union related jobs within or outside Egypt. This has not proved to be the case. In fact where we raised this issue with ETUF and we were told that the issue was considered and ETUF had resolved to keep the persons trained in speciality fields - and were prepared to provide extra salary and benefits to keep them where necessary.

The three persons that were sent to the U.S.A. for graduate degrees appear to be unique to AALC for labor programs. Of the three persons funded, two completed their degrees in industrial and labor relations and the third for personal reasons, had to

cut short his degree work and return to Egypt. Both of the Egyptians with MA's are still in the labor movement and are using their knowledge. Mr. Abdel Salam Ayad is now Deputy Director of the Workers' Education Association for all of Egypt and is at the Workers' University providing lectures on collective bargaining and related topics. Mr. Ayad is scheduled to become Dean of one of the W.U.'s planned two-year programs in Labor and Industrial Relations. The other long-term, two-year program will be in labor economics. The second person that went to study at Wayne State for his MA degree is Mr. Asem Abdel Haq Saleh, the current Minister of Manpower and Training, a former Vice President in the Textile Workers Union and a leading National Democratic Party officer we are told.

Mr. Ayad was interviewed extensively by Professor Mackenzie on his trip to the Workers' Education Association's residential center in Alexandria. Mr. Ayad was going to provide lectures on collective bargaining to some twenty-two unionists that were taking a one-week course sponsored by the Workers' University Labor Management Institute. The course was for union members that were elected to the position of the union representative on public and private companies' personnel committee. In addition the Dean of Labor Management Institute, Dr. Nassar, asked Professor MacKenzie to say a few words about his mission to the class on the AALC and the evaluation the team was in Egypt to undertake as the class was supported by AALC funds according to Dr. Mohamed Nassar. After his remarks for ten minutes on the review team and USAID-AALC questions, he was asked by the Chairman of the Health Workers, who participated in a USAID-AALC

sponsored education and training trip to the U.S., whether he would answer questions by the class. He agreed and with the able assistance of Mr. Ayad, who acted as interpreter, answered the detailed questions on U.S. unions and labor relations for about one and a half hours. The questions were of the quality that could be expected of a similar group of unionists in the U.S. or Europe.

We noted from the files that USAID turned down the request to fund Ph.D. candidates for training in the U.S. in industrial relations or related fields of study. Whatever the merits in this particular case, we should note that no university in Egypt according to the American Chamber of Commerce, university and union sources, has a graduate degree in Industrial Relations, labor Relations or Labor Studies. Therefore, having trained persons in Egypt in this vital field could be a significant move toward improving Egypt's future manpower potential. If the G.O.E. moves further along the road to privatization and permits more firm to union collective bargaining, then industrial relations or labor studies specialists will be in great demand. The Workers' University could become a major source of trained personnel for business, industry and government as well as unions and academia in these fields. After noting the above we also recognize that Ph.D. training is a costly long-term investment that must be weighed against other concerns.

On the question of adequacy of reporting to USAID on the U.S.A. visits, we understand that the AALC Washington prepares detailed programs for individuals and groups (with the exception of MA students). We assume that certain of these programs could be made available to USAID Egypt, if requested.

#### Equipment Bought for the Workers' University

The USAID-Egypt purchased a variety of items for the Egyptian Trade Union Federation on the basis of their requests through AALC. The equipment requests made by the AALC constitute a major part of the total budgets approved by USAID-Egypt and the G.O.E. The total equipment expenditure makes up approximately 25% of the total dollar budget allotted to AALC's use based on the USAID Summary of AALC Activities. The dollar amount was approximately \$560,000 with an additional 2,500 Egyptian pounds spent over the five projects.

A second reason for examination of the equipment accounts, the equipment itself and its uses was the internal concern that engulfed equipment requests. Equipment purchasing appeared to be something of a political football between USAID-Egypt and AALC (memos noted helping people not buying things) and between USAID-Egypt and the GOE Ministry of Economic Cooperation that must approve all U.S. expenditures in Egypt.

We are not convinced that if AALC had written stronger justifications for equipment that it would have made any real difference. However, we also saw no harm in AALC writing more detailed support for major equipment requests. Perhaps some additional information could be given on the need: the use the

equipment is to be put to, will it or not be income generating for the Workers' University and the ETUF in the long or short run, etc. If possible some comments on how the equipment may assist in some small way in Egypt's developmental process would appear to meet USAID's concerns.

In our two visits to the Workers' University in Cairo, and our two visits to ETUF and Professor Mackenzie's visit to the Workers Education Center in Alexandria the issue of equipment was discussed. Such questions as to whether it was being put to good use and whether certain peices were in working order. There was uniform support for the equipment and its necessity. During our first visit to the W.U. we were able to see the printing equipment in place and the major pieces were operating on and off while we observed several texts in Arabic being set-up, printed, paper cut and the text bound. The equipment was working and the operators seemed to know what they were about - with the exception of the young men in the bindery who were binding texts and appeared to need more training.

We reviewed the list of equipment purchased by the AALC for the Workers' University from 1983-86 to determine whether or not such equipment would normally be found in a university setting. We concluded that all items listed with one exception would be found at any U.S. university, college or public or private training center. The exception was an item listed as a loyalty statue at the cost of one Egyptian pound. We were more curious about the item than we were about its cost. In addition we found receipts, letters in the files such as one to AALC Egypt from the

Director General of the Workers Education Association acknowledging receipt of equipment.

We were able to observe three of the four buses and one of the two vans purchased plus many pieces of equipment on the AALC list. We were told that all of the vehicles were in working order at this time.

One of the concerns that was expressed by a USAID-Egypt official was whether or not the US taxpayers equipment was being utilized properly by the Workers' University. We have two views on this question and they both revolve around what time frame we are discussing. All equipment that has been purchased is now in use or is being put to use by the Workers' University. However when it is purchased and delivered there was often a substantial gap in time before the items were utilized. We found this to be true of the Language Laboratory, computers and the printing equipment.

The computers were on line while we were there and about one half of them were doing administrative work. Others were being utilized by trainees who were operating them under the watchful eyes of two instructors. In addition we found two people present who were designing software for the PCs. They, if we are correct, were there on behalf of another educational donor to the W.U. that was funding this project. We also found that about 1/3 of the computers were missing from the University. We were told they were on loan with USAID approval. This was substantiated by a memo found in the USAID files at Cairo Center.

We also found the language lab to be in place and we found a French-Arab speaking instructor present. Mr. Dawson, who is fluent in French, was able to discuss what he was doing with the lab from the instructor's perspective. We also found out that Cairo University had been contracted to provide instruction using the language laboratory. We were told that several donors such as the British Council for EEC has developed plans to assist in the labs development with the help of specialists and text books that were to be sent in from Great Britain and elsewhere. They were to come to Egypt.

The printing equipment provided W.U. with three forms of assistance once the workers were trained to operate the equipment and a plan of action developed. First the equipment enabled them to save money by doing their own printing instead of farming it out to a private more costly source. Secondly, the W.U. was able to coordinate their class schedule with the production of texts for the classes. Prior to this it was a game of chance as to whether the texts would be on hand for opening day of class, whether they would arrive during or after the class. Finally, the Workers' University is also utilizing the printing equipment to take in work from other trade unions for a fee. This brings pounds into the coffers of W.U. and there are plans under consideration for expanding the printing into more commercial or money-making venture in order to provide greater support for W.U. and its programs.

In conclusion we would agree that the equipment purchased is utilized and it has also acted as a catalyst to other international donors to provide their funds to W.U. to make greater use of the equipment. These is an economic multiplier in affect at the W.U.

We have three suggestions that we would make in the field of equipment purchasing. Two involve equipment needed; the third has to do with equipment utilization.

1. There is a need for simultaneous translation equipment. The type that seems most feasible can be used with a head phone with a multi-channel power pack that is pocket sized along with a portable interpreter station(s). The number of units may vary considerably and this is beyond our scope of work.
2. Secondly the library of the W.U. needs assistance in terms of text books in a variety of labor relation subjects, both in Arabic and in English. Some consideration might be given to the supply of several hundred texts in English to the library over time. These would be of great assistance to the permanent staff, the tutors as well as students; several of whom are fairly proficient in English and still others who are working on their English could utilize the English texts. U.S.-based labor relation textbooks are non political and are possibly the most up-to-date in the

world. If a library project is undertaken over a number of years, it will probably be supplemented by other donors such as the ILO, British Council (EEC), U.S. trade unions and U.S. university and college donors.

3. Finally we would recommend that consideration be given to tying in the purchase of a major piece of equipment with a "developmental plan" on how that piece of equipment will be utilized. It seems to us that what we have is a situation where a needed piece of equipment is requested by ETUF to AALC. There is a feeling that there is a 60-40 chance that they will not receive it through USAID and the G.O.E. Therefore everyone sits back and waits, and takes no further action until it is delivered. One way to move the process of equipment utilization along might be to notify ETUF/WU that the purchase has been approved and that a utilization plan should be developed and submitted to AALC-USAID. This might get the donees to think about how major items of equipment would be utilized. This could well make the equipment more productive, sooner. At present there is a substantial gap, often months, between delivery and eventual utilization of the donor's equipment.

### Workers Education Activity

In order to provide information on the current system of worker education conducted under USAID-Egypt AALC funds we examined the document "WEA (Workers Education Association) Educational Activity Plan of April, May and June 1988 Financed by AALC". This recent plan or estimate of activity was submitted to the AALC by the Workers' University/WEA to indicate programs to be covered by AALC/USAID funding.

The program estimates break the individual programs down by five of the seven Workers' University's institutes. These institutes provide specialized education and training continuously for the Egyptian trade unions officer corps: the national and local union elected leadership, and specialists. During the three month period under review in the document quoted, AALC monies were utilized as follows:

#### Institute for Trade Union Studies - Four Courses

Subject = Collective Bargaining  
Term = Five days - resident  
Students = 20 students/course estimate  
Cost per course = 2530 LE  
Cost all courses = 10,120 LE.  
Cost per Student/Week = 126.50 LE  
Cost per Student/Day = 25.30 LE

#### Social Insurance Institute - Two Courses

Subject = Social Insurance Secretaries of Chemical and  
General Trade Union  
Subject = Social Insurance Secretaries of Commerce General  
Trade Union  
Term = Five days - resident  
Students = 20/course  
Cost per course = 2530 LE  
Cost all courses = 5060 LE.  
Cost per Student/Week = 126.50 LE  
Cost per Student/Day = 25.30 LE

Labor Management Institute - Four Courses

Subject = Personnel Affairs - two  
Subject = Elected Bond Members - Two  
Term = Five days - resident  
Students = 20 students/course  
Cost per course = 2530 LE  
Cost all courses = 10,120 LE.  
Cost per Student/Week = 126.50 LE  
Cost per Student/Day = 25.30 LE

Institute of International Labor Studies - Three Courses

Subject = International Trade Union Movement - Two  
Subject = International Labor Organizations - One  
Term = Five days - resident  
Students = 20 students/course estimate  
Cost per course = 2530 LE  
Cost all courses = 7590 LE  
Cost per Student/Week = 126.50 LE  
Cost per Student/Day = 25.30 LE

Industrial Safety Institute - Three Courses

Subject = Members of Industrial Safety Committees - three  
Term = Ten days - resident  
Students = 20 students/course estimate  
Cost per course = 4360 LE  
Cost all courses = 13,080 LE.  
Cost per Student/Week = 218.10 LE  
Cost per Student/Day = 21.80 LE

Worker Education Institutes - Seven Courses

Subject = Methods of Scientific Research - four  
          Promoting the Working Women  
          Participation in T.U. Organization - two  
          New Trends in Workers Education - one  
Term = Five days - resident  
Students = 20 students/course estimate  
Cost per course = 2530 LE  
Cost all courses = 16,450 LE.  
Cost per Student/Week = 126.50 LE  
Cost per Student/Day = 25.30 LE

The costs estimates per student were uniform in all categories per course per week. However, when the course was raised from five days to ten days the cost estimate structure changes:

Accommodations	840	1 week raised to 1680 LE proportional
Lectures	450 LE	per week raised to 1000 or 100 over the proportional five day cost or 900 LE
Stationery	200 LE	= 5 or 10 days, the same
Publications	500 LE	= 5 or 10 days, the same
Pocket money	240 LE	= proportional to 480 LE
Transporta- tion & petty cash	300 LE	= raised to 500 LE

The only two items in the uniform cost estimate structure are the increase of 100 LE for lectures and the item for transportation and petty cash. The latter does not make sense on the face of it. But it is an estimate.

We were shown the actual cost adjustment forms based on the cost estimates at the AALC office together with all receipts (in Arabic) which were to be sent to AALC-Washington, D.C. when the programs are completed.

One of the principal concerns of the review committee was to look at workers education and the courses and programs sponsored by the AALC with USAID-Egypt funding. In making a determination on how best to approach the problem we first reviewed the available USAID and the AALC files. They were of some assistance but they all view workers education courses in a macro-perspective or in terms of the estimated number of courses or programs to be given with very little reference to the question: courses in what? Or, on what topic or at what level or why they were needed? We did our best but the figures did not appear to be available in Egypt. Based on the process of USAID grants or funds for courses and a system that does not require data, none was provided by the AALC. Although the issue was raised at the grant approval stage on several occasions within USAID - on different projects, but there seem to be little follow through by

sitting down to work out a system of reporting. This may well be due to the constantly changing personnel on the U.S. government side with successively six USAID project officers, three Embassy political officers with labor reporting responsibilities, and on the union side four people at the AALC level in Egypt (Richter, Gebremariam, Loebarth, and M. O'Farrell).

There are some reports in the files, most of them quarterly one for as long as nine months. (There is not much education activity in the trade union election year - elections normally run over a six month period: June to November). There are reports that come from the WU and go to the AALC to justify expenditures. They are then followed up with a reconciliation of actual costs versus estimates with receipts and vouchers all in Arabic. These are consolidated by AALC and sent to AALC Washington for processing of the dollars spent and the Egyptian pounds to USAID-Egypt. The reconciliation statements are sent to USAID-Washington with copies to USAID-Egypt.

We did review what documents we could find at the AALC office. Most of them were on the present project as all past records are sent to AALC-Washington. But in examining other documents we found several lists of text titles that were printed for the courses, providing a clear indication that there were a large number of different course topics taught.

The new director of the WU/WEA, at our first meeting with him, did say he would see if it would be possible to obtain past records for us, but he was unsure as he is new to his job. He did indicate that since he took over, he had the opportunity to establish new systems so that current project records can be

supplied and future records will be made available. He is also attempting to utilize the USAID/AALC computers to develop a better recording system.

Whatever the past record-keeping problems were, the future ability to document the project looks promising.

In line with this, when Mr. Dawson visited Ms. Christine Street and Mr. Naghei Abdalla, British Council officers implementing EEC assistance to the WU, he was informed that the Council was supporting the Workers' University and they planned to bring in a European specialist to work with the computer program. An expert had already reviewed the language laboratory and on his recommendation additional language textbooks would be supplied. Both were felt to be very worthwhile.

We determined that another way to view worker education is to examine whether or not there is a stable delivery system that is permanent and responsible so that funds provided by outside sources (or from within Egypt) can be spent with the assurance that they will be utilized to meet the donor's objectives with little waste or loss. The review team agreed that ETUF Workers Education Association and the Workers' University provided the proper structure within Egypt to meet the workers and union labor education needs and they have developed a trained, competent staff to carry out the programs of sufficient quality and in sufficient quantity to generally meet the trade union leadership's and membership's needs.

It should be noted that the worker education program developed slowly to meet the needs of the workers as it developed and that it evolved to a more and more sophisticated system as time went on. In addition Egyptian unions utilized outside consultants from the International Labor Organization and various trade union centers around the world. They did not attempt to develop their programs on a nationalistic, egocentric thesis, thereby wasting time and money.

#### The Workers Education Structure in Egypt

At the base of the workers educational pyramid there are 53 workers education centers distributed throughout Egypt. Each of them has a director who is responsible for the centers' programs. The union students for these centers' programs usually come from business, industry, government and other sectors within their geographic area. There are basic, advanced and specialized courses taught in each center. Over the centers are eight worker education regions, each with a regional director who is responsible for the centers in his region, and who reports to the director and his deputies in the Workers Education Association, Cairo. All tutors or instructors that teach in the 53 centers must go through a 30-day course in teacher training at the W.U. This is a required course on methodology. These same tutors may also obtain additional instruction over the years in several subject-content areas. The instructors or tutors receive a

stipend for their efforts. Certain of the tutor training courses, we are told, have been financed by AALC alone or together with AALC and other donor union organizations. The AALC director usually addresses these sessions on the subject of AALC/AFL-CIO and USAID.

The worker education center courses are divided into basic, advanced and special programs as follows:

Basic program - The basic one-week program includes economic, social, political and religious subjects.

Advanced program - (includes agricultural emphasis in some programs). The advanced program takes two weeks and is limited to the students who were the best in the basic programs. The topics covered are trade unions, economics, politics, social and religious studies.

In addition to the basic and advanced programs, there is a third area of study in the worker education centers:

Qualitative program - The centers will add into existing programs or develop specialized workshops according to the nature of the work they are dealing with such as social insurance, industrial safety and high productivity.

The worker education in the center is considered to be General Education and it is geared to rank and file workers. According to our information the workers that come to the Center come from business, industry, government, etc. The "business firms" for instance would agree with the Center director to send x number of workers to the institute each year - say 100 workers. These workers would be broken down into groups of 20 for the classes. The cost and fees as it are born in part by the

employer according to the agreement with the "employer" and the Center. These centers we were told have a more or less full course schedule throughout the year. One Regional Director interviewed said his center programs range is 18-25/year.

Beyond the basic education, workers education moves up to its next level in Egypt where it is called specialized education. Specialized education is provided for through the Worker Education Association's seven Institutes. The seven institutes are:

1. Institute of Workers Education
2. Institute of Labor and Management
3. Institute of Industrial Safety
4. Institute of Industrial Labor Relations
5. Institute of Social Insurance
6. Institute of Population Studies
7. Institute of Trade Union Studies<sup>1</sup>

Each of the institutes have their speciality field of education. We are told there are usually at least three program areas under each institute. The students that attend the specialized institutes are local and national union officers as well as union specialists. The programs usually are one week in length and are held in Cairo or other outside Cairo residential center.

In addition in Alexandria there are two WU residential centers that are used as well as two centers that belong to national unions ie, the Petroleum Workers Union.

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<sup>1</sup>The titles may not be exact but the titles are representative. Certain of them have been changed and re-changed in the past few years and when literature is dated.<sup>3</sup>

In our review of USAID programs in Egypt we also noted that USAID has programs on both population studies and education. We also found the WEA has specialized programs that deal with both topics on behalf of ETUF. It may well be with the proper catalyst, USAID-AALC and WEA/WU may well be able to work out pilot programs in both areas. USAID would have an existing vehicle or channel their program through what is already in place and working very well.

The AALC could assist by using its good offices and warm relationship within ETUF and the WEA. We would add a strong word of caution that any such programming institute would have to be treated as an addition to not in lieu of existing AALC programs. If this would be attempted it would be met with strong resistance by both AALC-Egypt and Washington and probably ETUF. There is no labor education (U.S. version of worker education) specialty in population studies in the United States according to Professor Mackenzie so labor expertise in this area if needed may have to be sought out in Europe or from the ILO. However, labor educators have great skill in what is known in the U.S. as joint planning. This is the process of sitting down with the University and the union and working out a program that inserts new academic content from almost anywhere or any discipline into a labor education program. This often requires sitting down with the academic, government or business experts to explain labor education, teaching adults, union policy, etc.

Trade unions in recent years have developed a number of programs to assist their illiterate or semi-literate members in the United States. They work with their members - often times

with the employer or the local school system working together with the unions. Despite the usual adversarial relationship between the employer and the unions, the last 15 years of experience in the U.S. has proved that where there are mutual gains both work together harmoniously. In fact in this area of common activity education has in part led to other areas of cooperation. There may be some U.S. experience that may be transferable. However, our brief examination of the W.E. literacy program indicates that they have fairly strong system that includes the unions, the employer and the Ministry of Education. This may be an area of nation building through improving the literacy skill of the work force and thereby make it more productive. Education in plant is more and more a necessity because many new machines now require a high school graduate to operate them efficiently.

The above discussion on both population and literacy studies are part of the discussion of the WEA specialist education given through its institutes (see the description of the WEA Institute of Population Studies and the WEA literacy program in the WEA pamphlet titled, The Egyptian Trade Unions Federation. The Workers Education Association, Workers University, May 1, 1983).

#### The Workers Education Association - Administration and Finance

1. The Governing Board - 15 members
  1. Director General who serves as Vice Chairman
  2. Four members representing the Ministries of Manpower and Training, Education and Industry and a member representing the Universities

3. Nine members from Workers nominated by the Egyptian Trade Union Federation

4. The President of ETUF who is the chairman

In reviewing the composition of the above Board it seems to the Review team that it could be utilized as a support team to assist in obtaining project support within the GOE for the USAID-AALC proposals. Care would certainly have to be taken utilized this vehicle. But we would assume that normal circumstances that the Board of the WEA would be supportive of increasing and improving workers education opportunities in Egypt. This vehicle should be discussed between USAID and AALC to obtain common agreement and then discuss the issue with the ETUF leadership and perhaps other principals such as the Embassy.

## 2. Financial Resources of the Workers Education Association

According to one estimate the budget of WEA is one million plus pounds. The sources of finances are:

1. Trade Union subscriptions
2. Annual subsidies allocated by various governmental organizations
3. The WEA's share of fines levied on workers (about 1/3 if we have read the laws correctly)
4. The WEA's share in the agreements concluded between the WEA and the Workshop [some confusion here but it appears to be an overhead or administrative fee].
5. Contributions from some international institutions and organizations
6. Revenue in books and bulletins published by the WEA

The WEA receives support from a variety of sources as you can see from the above and to some extent tries to maintain itself on a self support basis. This we understand, is somewhat difficult because of considerable income variations that take place from year to year, having a permanent staff and the pressure for additional programs. Some consideration might be given to the examination of the income sources, with approval, with the goal in mind of assisting the WEA to develop its revenue. We just did not have sufficient time to explore this area and to make recommendations. However, we would venture to guess that given good income producing ideas the Egyptian entrepreneurial spirit would find ways to utilize them - just as the WEA/WU is doing with the USAID furnished printing equipment. They plan to do - somewhat vaguely with the WU new residential halls. They plan to house approximately 100 plus people in the halls for educational purposes and utilize the rest of the space initially for some sort of rent out quarters for short time unionist staying in Cairo. USAID perhaps through AALC might consider supplying technical assistance in managing and marketing a resident center. Certain US University Centers make big dollars through their residential conference centers.

#### The Workers' University

The W.U. is the final phase of trade union education in Egypt. It was first recommended in 1972 at the first conference on workers education. The The University's corner stone was laid in October 1974 in Nasr City. In its early years it seemed to be considered an institute or training center despite its title.

However, in time as worker education developed, the W.U. is coming much closer to becoming a University or at least a community college in the more traditional sense. The W.U. is considered in their own terms to be "the concrete embodiment for the summit of scientific thought and worker education." It hopes to promote a "standard of worker leadership on a sound scientific basis that comply with the spirit of the age and transcended to the highest level of trade unionism in the world" - so that the workers can be guided "toward a new and better society." The language may be a little grandiose but the spirit is there and it seems to us that ETUF has been moving clearly in the direction of developing a first rate residential institution that will supply long term, in depth education for Egypt's trade union leadership. At present their concern has centered on the physical plant, its equipment and furnishing. They have the University administrative offices, classrooms, libraries and labs in place and they are in the process of developing their laboratories. The residential facility has been built that will house the students for the long term programs as well as the short term specialized program students that would be attending one and two week residential programs I would assume for a fee. In addition the residential facility house the U.S. supplied printing press, computer layout equipment, etc. In addition the facility will provide additional space for classrooms. This complex has been built behind the W.U. building and it appears to be generally complete - but not livable yet. A dispute exists between the W.U. and the contractor that we are told is moving toward some

form of resolution. [Our visit to WU on September 25 found several workmen at work on the resident hall.]

The W.U. has also given considerable attention to: curriculum and faculty by ETUF and WEA/WU by establishing to faculties one for the curriculum in Trade Union Studies and the other for the curriculum in Labor Economics. In addition the W.U. has requested and received USAID/AALC support for MA training in Industrial and Labor Relations in the United States. Two persons as we noted elsewhere were sent to the U.S. and received their degrees. An additional request for Ph.D. training in the U.S. was made and rejected. This indicates an interest to develop a highly qualified faculty to teach and administer the long term programs. We did not have sufficient time to consider the ramifications of such requests by tying them into the goals of the W.U. and the curriculum. But the process that is being followed in Egypt is sound and should whenever possible be supported. This we understand is also the position of other international educational donor groups. We would recommend the AALC join with other educational donors in a special project to develop support for the Workers' University through a developmental plan that would be agreed to by W.U. and ETUF and that they would play a major role in developing. When the plan is agreed on, time tables set, the donors could establish possible funding sources from their governments - a potential manpower development center for Egypt's trade unions and the country could be added to the Egyptian economy.

The Trade Union Studies Faculty - four divisions

- Trade Union
- International Labor Relations
- Workers Education
- Labor Information

The Labor Economics Faculty - four divisions

- Labor Management
- Social Insurance
- Industrial Safety
- Labor Cooperatives

Admission to the two year programs of study would be open to members of trade union organizations, elected members of governing boards, members of industrial safety committees and ambitious trade union leaders what we would call in the U.S. rank and file activists.

USAID Support for AALC Labor Projects

We can not close our report on workers education without attempting to come to grips with the issue of worker education support in its broadest sense by AALC/USAID. We attempted to analyze the grants and their categories in several different ways from the materials made available. One of these was to examine the costs of the grants per category [which appeared to be more or less uniform throughout, but this did not mean that every category was funded each grant period].

<u>Grant Category</u>	<u>Total Monies/Category</u>		<u>No. of Years</u>
	<u>Dollars</u>	<u>Pounds</u>	
Short term training	258,700	-	2
MA training U.S.	73,400	1,700	2
Short term in country seminars	97,294	688,650	5
National health & safety training	269,480	10,700	5
Union leader study tours to U.S. (83-83-16 persons) (84-85-10 persons) (85-86-10 persons)	No funding		3
Impact activities	284,350	8,300	5
Funding for unanticipated AALC staff	135,000	12,450	4
Equipment	559,490	2,500	4
Miscellaneous	202,605	-	1
Evaluation & design	35,610	12,000	1
Program coordination (13 mos.)	115,000	50,000	1
AALC program coordinator	128,000	-	1

The above break down indicates the program frequency, the cost items in the aggregate in both dollars and pounds. We did not find a cost item for the union leadership tours. This we found somewhat unusual do to the number of memos expressing concern about the study tours. These may have been handled separately or come from non-USAID funds such as USIA, Embassy and National Endowment for Democracy.

We had attempted to analyze the cost figures in a yearly basis but ran into difficulty with the Egyptian pound figures. We were apparently working with two figures - the appropriated or approved request figure, the changed figure and the expenditure figure. We feel that it would have been easier to have had figures that matched up by year such as a table:

1983-84      approved      spent      changed term and amounts  
                 \$      LE      \$      LE

In conclusion to this section we think a great deal of excellent work was accomplished during the five grants that extended over a ten-year period that without an agreed to continuous reporting system it is difficult to make evaluations by or for USAID. Because of the AALC-USAID relationship in Egypt a simplified agreed to reporting system should be put in place, a fact that is commented on elsewhere in our report.

## V. EVALUATION AND MONITORING IN FUTURE

An approach to evaluation and monitoring of the AALC (Egypt) is recommended here with the positive intention to strengthen any continuation of the project after 31 January 1989 which may be financed by USAID. A number of the requirements for sound evaluation are indispensable also for good project design, so these remarks may serve to assist sound formulation of a new AALC project.

It is our understanding that the project implementation agency, the AALC, objected to certain requested evaluation content and would strongly prefer self-evaluation. Effective continual monitoring and self-evaluation during project implementation can, when the findings are fed back in the form of improvements of project design and methods of implementation, increase the desired impact of the project. It may also yield sufficient ingredients for more satisfactory and acceptable project progress reporting to USAID. Such reports could obviate a further need for external evaluation of this AALC project by USAID itself.

The second purpose of this chapter is to demonstrate, by implication, that a full-fledged evaluation of project activities of the five "annual grants", which were time-extended to cover the whole period 1979-1989, was not possible for the mission with the documentation and other sources of information accessible in Cairo in the time available. We would stress "in Cairo", since more information may be available in Washington at AALC headquarters. We mention "in the time available", limited to

about two weeks since our draft report was required five days in advance of the final working day of our three-week visit to Egypt, and the rate at which the parties could be accessed was slow.

We can attempt, in these circumstances, the qualitative and deductive type of evaluation of the project which we have presented in Chapter IV. Better than this, we can also use the benefit of our extensive experience, including prior knowledge of Egypt, and of the impressions and observations gained here now, to make our recommendations in Chapter VI firmly and confidently, in regard to the future form and content of American support to the Egyptian labor movement and how to track its progress and impact satisfactorily.

(i) Project Document

The project document describes the project, its objectives, the resources to be used, the activities to be undertaken that will reach the objectives, and their schedule. It should be written to serve as a basis for evaluation as well as project planning. The evaluation will try to discover the project described and the objectives obtained.

(ii) Objectives

Most projects are intended to reach one or more broad goals, such as: international friendship, or economic development, or strengthening of institutions, or political stability and effective government. In both project design and evaluation, the link between project activities and such ultimate goals as these should be traced and stated. The AALC project can, in principle, promote socio-political stability by training

trade union leadership, a significant political force, to deal responsibly and competently with Egypt's demographic and economic problems.

Our "scope of work" (see Annex B herewith) envisages an analysis of the relationship between "inputs" and "outputs". "Outputs" can be defined narrowly or broadly, but generally speaking input-output analysis will yield a limited picture of the cost-efficiency of the project. This is what good monitoring produces. Evaluation proper is broader and deeper: it embraces an assessment of the project's incidence and impact in terms of goal-reaching and of economic and social development. Attendance in classes and study tours is an output. Examination of the relevance and extent of the knowledge and skills acquired, and of the opportunity for, and taken by, the attendees to apply them later, brings us closer to the project impact which is sought for, and then evaluated. We note that AALC trainees and study tourees have become members of parliament and cabinet ministers, which may be expected to have a positive political effect.

A well-designed project starts with a statement of broad goals, and then sets up immediate, specific objectives whose attainment will logically be goal-promoting. The AALC project has, mainly, the objective of education of workers and their leaders, but is confined to assisting (directly) trade union members. Indirectly, other Egyptian workers may gain a little from better leadership of the labor movement. AALC also has a subsidiary objective: to make some humanitarian gestures, such as the supplementation of medical services to certain workers. Pursuit of this shares with the main, specific objective, a

common by-product: promotion of good will and friendship between American and Egyptian trade unions.

A common aim of this AFL-CIO action in the Third World (and also in Europe) is to promote free democratic trade unionism. Much of the trade unionism supported, incidentally, is pluralistic: not tied to one ideology and certainly not to communism and that version of "democracy."

Probably these American projects over the developing countries supporting democratic labor movements must, to be eligible for USAID sponsorship, have specific "developmental" objectives, like any other USAID projects. After all, it is (as titled) the Agency for International Development. The AFL-CIO says "industrial democracies abroad, especially in Scandinavia and West Germany, base much of their international activities on Governmental grants as a matter of right" (Appendix D). Presumably AFL-CIO expects the same treatment from a country so wealthy as its own, and is frustrated by the sharp focus, specificity and conditionality of the USAID missions' handling of most of the U.S. Government funds available to support AFL-CIO's international activities.

(iii) Tacit Assumptions and Pre-Conditions

During evaluation, especially when conducted within the logical framework for long generally used by A.I.D. as a project planning and evaluation procedure, one identifies and expresses at the project preparation stage the tacit assumptions and pre-conditions on which the project will depend for its success. Without the logical framework, tacit assumptions, and

pre-conditions normally present and taken for granted, tend to be overlooked and not expressed.

It was evidently tacitly assumed that the AALC project, being supportive to Egyptian democracy and development, supported politically in the United States by the AFL-CIO, would be fully backed by the U.S. Embassy and USAID. Equally, it was wanted and greatly needed by the Egyptian labor movement (ETUF) and powerfully supported through the ETUF's role in the government. U.S. funding seemed also to be taken for granted, quite reasonably, since the grants required were at an insignificant level compared with the total annual USAID program of \$815 million which is guaranteed as a minimum as well as a maximum by separate legislation for Egypt. Each grant to the AALC was annual, it being again tacitly assumed that it could be approved by all parties concerned, and activated and entirely disbursed on the approved activities within the twelve month period specified.

In practice, initial proposals were chopped about and remoulded by USAID, approved in delay (especially recently) by having to await Egyptian Government approval. Activities then started behind schedule.

(iv) Baseline Situation

It is only possible to measure progress on the basis of a clear picture of the situation at the starting point. For the next project program period, data should be gathered in the remaining months before the next starting date (1 February 1989) about the current status of the existing educational facilities and faculty; present level of training capacity; range of subjects and areas covered, the proportion of total trade union

lected officials, and that of all other members, who can expect to receive each category of training and of study travel in one year; the present set up and resources of the coordination office and so forth. (In this connection, see the "Indicators" mentioned below). This current picture can be compared with the better situation which should be reached at the end of 1993. It can also be compared with the picture before 1979, if sufficient data can still be found somewhere to provide that baseline for completing the present evaluation.

The other elements in a normal, systematic evaluation system - time dimension, indicators of project inputs, outputs and economic and social impact - are more technical and detailed and are presented in Appendix A.

## VI. CONCLUSIONS AND RECOMMENDATIONS

We are convinced that the overall conception of this AALC project is basically sound. It improves American relations with, and strengthens the capacity and effectiveness of, a very significant democratic force in Egyptian politics: organized labor. It reaches not only Egyptian leaders, as do other diplomatic initiatives to make friends and influence people. It also enables a democratic American institution to reach the rank and file of the workers through the people they trust best--those they have elected to the trade union offices. This is a rare, perhaps a unique, opportunity for USA to reach almost directly to the very grass roots of a country it wishes to befriend.

Egypt's course toward its day of economic reckoning is accelerating at an alarming rate, though the government is moving to attempt to solve its problems with the hope that the people can accept the degree of austerity required. "We cannot," said President Mubarak, "stabilize prices and increase wages simultaneously as some people think. The governmental subsidies reached up to 10 billion pounds annually due to the increasing population, while Egypt's total revenues are established at 18 billion pounds." (Egyptian Gazette, September 27, 1988, page 3.) The population grows by one million every ten months. Externally, Egypt is heavily dependant on food aid and other external aid both to be able to supply basic consumer goods to the mass of consumers at prices way below the world level and to

meet Egyptian needs for capital while Egyptian capital remains only partially mobilised or is placed abroad.

Population growth outpacing production of food and other essential items, and pressures from creditors and other factors, may cause imposition of a limited number austerity measures on a population largely below the poverty line already. The violent food riots experienced in the past can return. The turmoil could be turbulent enough to threaten the successful outcome of many of USAID's development projects.

It will help a great deal if the workers and their leaders can be educated to understand better the economic problems and the structural and other reforms which should be accomplished for the sake of their future wellbeing. The chances of keeping Egypt reasonably united through the coming difficulties are improved by this AALC project, which costs less than 0.1% of USAID's total annual program in Egypt.

For the reasons we have given at the end of Chapter III, the AALC project is not to be considered exclusively or even primarily as a development project in the narrow sense of an economic investment which can soon become self-sufficient, viable and eventually profitable. It is to be judged both for its socio-political value as well as for its economic value to Egypt.

This being said, we are convinced, deductively, that it has economic value in the final analysis. But we have found in Cairo much less of a quantitative and documented record than there ought to be of the substance and impact of its activities and we suspect that the full story - of a kind which our Scope of Work requested - is not now to be found anywhere.

It may be asked whether, in the absence of the full story, we have any basis or justification for making recommendations regarding future assistance to AALC at any level, let alone a possibly higher level. We have nevertheless persisted with our recommendations below, for the one sufficient reason that we were asked in the Scope of Work to "provide recommendations on future assistance, its magnitude, time period and focus." Our obligation to do this is not circumscribed in any way. It is not, for example, stated there that we should only make such recommendations in the event that our evaluation is favorable.

It is, of course, normal to use an evaluation for its customary purpose: to apply in the continued project, or similar projects launched elsewhere, the lessons learned from the evaluation about pitfalls to avoid in future and effective steps to improve the project.

What are the lessons learned in this case - the AALC in Egypt?

First, it is necessary to have a new design and a document for the project. The foremost improvement required would be to give clear and unambiguous expression to project objectives and purpose. This expression should recognize:

(i) The purely "developmental" elements in the project comparable to other AID projects and susceptible to being subjected to similar procedures for reporting, monitoring and evaluation.

(ii) The "relational" and "fraternal" elements, in the project which can yield best results if left to the AFL-CIO and the AALC to implement these union-to-union activities without any governmental oversight at close range and, at a distance, only the governmental supervision required by auditors to safeguard the proper use of public funds.

Secondly, it is necessary at the outset for all the parties concerned - USAID/Washington, USAID/Egypt, AFL-CIO, AALC, the interested Egyptian ministries, and the ETUF - to agree on the project document.

We heard the suggestion in USAID-Egypt that the acceptability of the project for all concerned would be increased if the elements in (ii), and also any AALC-supported activities of a regional character benefitting trade unions and their members in other Arab and African countries, were financed by USAID funds other than the funds of the USAID Egyptian country program. This separate funding could also cover the costs of the Coordination Office in this separately funded category, even though quite a part (though not all) of the activities of that office are developmental, as in category (i) named above.

We are definitely not, however, making a recommendation on these lines because we believe it is inapplicable. From other views we heard in USAID/Egypt and from other information, we believe that alternative funding will not be found for these activities. They will have to be funded in the same way in future as before. However, in order to bury this issue we would strongly urge the following:

All concerned with the project in USAID should perceive that the AFL-CIO/AALC is not to be assimilated to a USAID contractor, whose staff must work closely and collegially with USAID staff. A contractor must do whatever USAID asks, subject to the dictates of the contractor's conscience and responsibility for professionalism. Whereas AFL-CIO-AALC and ETUF are democratic institutions which can only do what their members ask them to do: they propose the "menu" for USAID to choose the activities it wishes to pay for.

Hence, the AALC Coordination Office is not a USAID contractor's Project Management Office. It is a liaison office, offering perhaps the only channel for contact between USAID and the Egyptian labor movement. Due to the sensitivity of elements in Egyptian society to foreign interference or manipulation, it is necessary for USAID, and at times even AALC itself, to keep a proper "distance" from ETUF and the institutions it sponsors and manages.

At the same time, AALC should respond to USAID's responsibility as a custodian of taxpayers' money destined for development activities. AALC/Cairo should report not only to the AFL-CIO what reports the AFL-CIO wants; but to USAID/Cairo what it needs to know to satisfy its auditors and to know about the aspects of the AALC activities which have a developmental impact. These aspects probably do not need to be kept confidential; on the contrary, they constitute "good news" which will build further support for the AALC project.

Regarding the "magnitude, time period and focus" of future assistance to AALC we suggest:

- on magnitude, some increase to cover both project elements (i) and (ii) mentioned above and to provide adequately for the needs of the growing numbers of workers organised and reached by ETUF and the WEA;

- on time period, we envisage a multi-year programming approach adjusted to synchronize with the phases of the four-year cycles between each "election-time" period spanning several months in each fourth year. At this time, the elections absorb attention and energies and the project activities temporarily slacken: this is the time to formulate the next four-year project and to win the approval of the newly-elected union leaders for the new program proposed to USAID.

- on focus, we indicate our views in the forthcoming recommendations, which combine some new activities with a continuation of established activities, which are not duplicative and which are succeeding to "internationalize programs introduced under previous grants."

Our first recommendation is that the ETUF, WU and WEA, might be asked to consider seriously the establishment of a system of monitoring and self-evaluation along the lines we have sketched in Chapter V., with further comments in Annex A.

If Egypt succeeds in making substantial headway with privatisation and if collective bargaining emerges for the first time in Egypt, the potential benefit of AALC will increase.

Our second recommendation is that the courses and curricula of workers' education in Egypt, and the scope of the U.S. visits and studies by Egyptian trade unionists program, be broadened to put an emphasis on collective bargaining and to embrace management training and industrial engineering and productivity improvement studies as well as speciality training for worker education.

The Minister of Cabinet Affairs has underlined to us the crucial need to revamp Egypt's educational and training systems. The aim should be, he said, to improve vastly the extent to which the composition of manpower supply corresponds to the demand for manpower, especially by upgrading managerial and technical skills among the upper echelons of the labor force and motivate and adapt a majority of working people to make their living in agriculture and other rural occupations.

We perceive the great developmental significance of this measure, in view of the relative size of the capital and labor inputs in Egyptian production and the low level of labor productivity. The latter, together with under-employment, explains the lowness of wages and incomes.

Our third recommendation is that USAID, through the AALC and as in other ways as appropriate, should assist and encourage the Egyptian trade unions and the government to consult, and to cooperate with, each other in the task of improving Egypt's educational and training systems (including workers' education).

The latter recommendation implies, for example, labor participation in planning and oversight bodies in the education and training system, consultation of the unions by government and

the employees on such matters as manpower planning, occupational classification and organisation of courses and curricula related to job definition and jurisdictional lines, standards of competency, certification, etc.

The population growth must be arrested soon, for the survival of the country. The full support for family planning of all sections of the population is required. The density of population on the land excludes the possibility of small farmers improving on their agricultural income. The rural exodus, especially to Cairo, aggravates slums and disease and burdens the government with relief to the unemployed.

Our fourth recommendation is that USAID promote collaboration between the AALC and USAID's population projects to take full advantage of what the WEA and the ETUF can do to get the unions and their members to practice more effective family planning. Labor-management cooperation might also eventually secure employers' help in fostering this through family planning counselling and services units in large workplaces.

Expansion and productivity improvement of the Egyptian economy, and a genuine opening to privatisation and really substantive foreign investment in Egyptian production, requires a more mobile and flexible labor force that can be retrained and redeployed.

Our fifth recommendation is that USAID, through AALC, help to prepare the country's trade union leaders to participate effectively with business interests, government officials, and some politicians, in preparation for any reform of the legislation concerning labor (including workers' rights), on

social security, on manpower planning and training and re-training systems. This is in order to give them the technical knowledge to compete on an equal footing with business, industry and government.

Needs of such a large and growing population for education, including adult education, will outstrip the capacity of the formal education system.

Our sixth recommendation is that USAID, in collaboration with AALC, use the WEA as one of the instruments for promoting education in Egypt.

We do not envisage that AALC's own budget needs to be greatly expanded to accomplish these broad new tasks. Rather we foresee that other USAID projects which are well-funded for these purposes would ally themselves with AALC to obtain the collaboration and participation of the labor movement in their work.

If AALC and/or ETUF judges, in some of these instances, that the best interests of Egypt's workers are not served by these activities, the USAID will have to continue to look elsewhere for Egyptian counterparts for its projects.

Seventhly, occupational safety and health programs are humanitarian and reduce costly accidents in the work place and debilitating sicknesses which lower productivity and morale. Fear of accidents and hazards lowers labor productivity. Egypt

needs to make much further progress in this sphere. We find the report and recommendations by the AALC consultant Lynn MacDonald: "Recommendations for the ETUF Occupational Safety and Health Program a Four-Year Plan" well worthy of support and implementation.

Regarding the question as to whether USAID support for AALC/Egypt should continue, we felt it was necessary to explore the willingness of the Egyptians in labor and in government circles to continue AALC/USAID projects. Without this, we felt the projects might again be held up, as in 1987, by procrastination of those Ministries involved in giving their approval of further USAID assistance. Both the trade unions and G.O.E. were supportive of the AALC and the funding by USAID.

We have concluded that the continuing risk of this negative outcome is small, for the following reasons. First, a large part of the difficulty in 1987 was probably rooted in a temporary problem - now largely cleaned up. Secondly, we obtained from the Minister of Manpower a statement of his whole-hearted support for the continuation and enlargement of the AALC and his firm assurance that he would attempt to obtain the endorsement of new projects by other ministries concerned (the Minister of Cabinet Affairs and the Minister of International Cooperation).

This being so, we recommend as follows:

I. Term of the Grant

1. The review team after careful consideration agrees that a multi-year grant to AALC would be preferable to single year grants. We feel this would be beneficial even if there must be some form of annual review and submission by USAID for the

Government of Egypt. It is our judgement that a multi-year grant, an ear-marking of funds by USAID-Egypt, would permit an over all grant review with adjustments to be made by USAID-AALC when required by unforeseen circumstances. It would facilitate some form of better internal reporting to be developed which is difficult on adhoc grant programs which may be subject to an occasional hiatus. It would greatly improve the planning and execution of continuing activities which inherently require more than one year for their completion. It would assist in maintaining liaison between and among the parties involved, especially in view of the rapid turnover of their personnel. Finally we believe that it may well be easier if a multi-year grant is approved to adjust the year by year activities more closely to the G.O.E. concerns. We have indicated earlier in this chapter the advantages of a four-year project periodicity. ETUF's project priorities expressed by AALC could well be put into developmental language by USAID in order to meet G.O.E. priorities by tying in the labor sector to those priorities.

## II. Funding Levels and Priorities

We recognize that what follows must be taken as a series of suggestions rather than recommendations; because it is for ETUF to identify what it wants and make the recommendations to AALC to incorporate them in its project proposals to USAID. However, it is inevitable after the many discussion we had on the same or similar subjects with the different parties, including the Minister of Manpower, that we could form some tentative conclusions about their requirements.

They may be considered for what they are worth, and be subject to discussion with other donors for coordination purposes.

1. Equipment

In addition to the AALC project allocation to provision of equipment, additional needs can be met by reference to the USAID/Egypt allocation to "commodities" assistance. A priority area for equipment purchase would be the Workers' University. AALC/USAID assistance in this area responds to the financial difficulties of the University and to the country's shortage of foreign exchange.

One major piece of equipment needed is for an emergency power generator. This is needed because of the constant power failures that bring the WU to a complete stop for hours - no classes, no computers, no printing, no lights, no typing. This item was requested previously, but was rejected. We feel it worthy of reconsideration if requested.

A second item would be modest funding for text books, journals in English and Arabic in the fields of labor-management relations, labor studies; labor economics [(not econometrics unless very basic), some macro, micro, developmental]; adult education and workers education, to note a few areas. This is the cheapest of the several forms of knowledge transfer in this project and has a high developmental impact.

programs in labor management relations and economics might need semester-long credit training. We would also anticipate more US degree study to be requested, including more MA/MS or even Ph.D. courses. The latter must be considered carefully - it is not long-term in all cases: candidates proposed before were already partially qualified.

4. Labor Education Training

We assume here that there will be a general program of up-grading of the instruction in the seven institutes, and for specialists on adult teacher training for tutor and for WU/WEA administration. They will want to visit US University and College Labor Centers, union labor education departments and their residential centers. This can contribute much to Egyptian development because the best of the specialists in each field can, with the broadening and depth of their knowledge through this program, teach better and produce excellent textbooks in Arabic for the Egyptian readership.

5. Manpower Training or the Union's Role in Skill Building

This issue we understand is under consideration by ETUF and it is a concern of at least three GOE Ministries. US unions have tremendous skill in apprenticeship training, journeymen (women), up-grading, vocational training, negotiating educational fringe benefits and education trusts. Visitation back and forth in this area could be beneficial. In addition many unions have

developed literacy and/or educational programs with their employers that might be of interest.

6. US Unionist and Labor Educators - Union and University to Egypt

In carefully selected areas of special need it might be more advantageous to bring US union or university specialists to Egypt for short terms, such as 30-60-90 days to teach union officers how to develop materials for new course areas, teacher or tutor training, research in problem areas of concern to the WU-ETUF, with advanced program development in the US and in Egypt. This might be a very cost-effective way of transferring knowledge and developing collaboration between workers educators of both countries.

7. Women's Labor Education Programs

Egyptian women like women in much of the rest of the world are leaving home to work in factories, offices, government agencies, hotels and tourist facilities, and elsewhere in each nation's economy. They are balancing their roles in life between that of a homemaker, wife, mother, and worker. Many families need the extra income in Egypt as they do in Europe, Japan, the USSR or the USA. With women in the labor force they become part of trade unions in their industry (about a third of ETUF's members) and like men, they need to have the knowledge of their union and their rights and responsibilities under their nation's laws and be able to take part in the life of their union. They also as

women workers have special needs that can be answered through education. Although we see a beginning of special programs for women in Egypt, we would recommend more consideration be given to the need for education of women through WEA and the Workers' University. We recognize Egyptian society has its own mores concerning women. However, it seems to us that USAID and AALC might consider what programs are available and what alternates there are in ETUF and WEA for strengthening existing programs for women and developing new initiatives such as new programs, exchanges involving women unionists, examination of women's programs in the U.S. and certainly other areas of particular interest to ETUF.

### III. U.S. Expertize Coming to Egypt

During our interviews, we ran into the problem of visitations of U.S. experts coming to Egypt to take part in worker education speciality programs. ETUF was supportive but would not want these visits to take the place of their members going to the U.S. They would be fine as an add on. The issue seemed to revolve around short visits, two weeks to a month, and finding qualified persons to come at short notice.

The U.S. system of worker education is different from the rest of the world. Universities and colleges do about 85 percent of worker education according to Mrs. Dorothy Shields, Director of the Department of Education of the AFL-CIO. Universities and colleges could be contacted and it is very possible that labor education professionals and labor studies on industrial relations

faculty not teaching credit course could be available for short term education programs in Egypt. A system of selection could be developed utilizing the AALC-D.C., the AFL-CIO Department of Education and the University and College Labor Education Association - UCLEA - perhaps through its International Labor Education Committee. A committee developed from the group could recruit, screen for competency, availability, and the ability to work in Egypt successfully.

Persons that come to Egypt could possibly assist with programs or curriculum development, tutor training, materials development, as well as teach or otherwise act as a resource.

#### IV. Language of Project Requests

There seems to be a continuing difficulty between the parties over the format and language of the project requests made by ETUF to AALC nationally in D.C. or "locally" in Cairo. The project proposal document for 1987-1990 we read seems to present straight forward exposition of what the project intends to do and may well be more understandable to labor educators when not couched in USAID "development" jargon. But this does not seem to be sufficient. AID-Cairo has its share of concerns. We understand that, like most aid agencies, it has project proformas which specify the key questions that should be answered in any acceptable project proposal or request for assistance. We suggest that USAID spell out in advance its format and language requirements and negotiate the matter with AALC. We feel this is necessary due to the lack of a labor specialist in USAID to interpret, - one who understands unions and their functions. The USAID should understand and consider sympathetically what it is

possible for AALC or unions to do. They do operate differently, with both a developmental and the socio-political side to their actions. It would be well for USAID/Washington to retain the services of a person familiar with the labor organisations and workers' education either permanently or as a consultant to act as a resource for all related USAID programs.

In this same context it seems to us that once the USAID-AALC resolve their "doctrinary" difficulty, project requests might well be drafted with more stress on Egypt's developmental needs. We think this can be done with a small amount of effort and a little rewriting of AALC proposals - and with AALC approval. This may well speed up the G.O.E. approval process. There is an old rule in collective bargaining to the effect that: "if you want to win your point, first think, then speak in the other fellow's language." It may well have some application in dealing with this in Egypt.

#### V. AALC and Other USAID Projects

We recommended early in this chapter fields for collaboration between AALC and other USAID Projects but feel it is worth further emphasis. There is an opportunity for USAID to extend both population activities and its education support through AALC to the ETUF and its Workers' Education Association. The WEA already has an existing Institute of Population Studies, that already obtains international donor support for its programs. AALC-USAID and WEA might explore a role for programs in population studies in the future.

In addition the WU has an education or upgrading program, plus the language lab at the WU that may well be linked up with USAID-Egypt programs in education. We would, however, recommend they both be examined by USAID and AALC prior to taking any initiatives. Our thought was that this is one more vehicle for USAID to strengthen their already existing programs.

We would again caution that if these areas are found interesting and feasible they should be added on to the existing AALC programs - perhaps at a later time some mix might well be agreed to in different years.

In conclusion we would mention a possible area for immediate action at the Workers' University before the first residential course opens this December. Almost all courses of the Workers University are supposed to be residential to enable students to concentrate and devote their time for study. Even within Cairo itself the city is so large that students with transport difficulties and delays arrive late for classes and may miss others altogether. The Residential Bloc of the University is still under completion. Any remaining needs not financed yet might be met now from AALC project funds remaining for 1988-89. It would be difficult and costly to provide for Pan African or Pan Arab Courses without the Residential Bloc facilities to say nothing of long-term programs.

## Appendix A

### Elements of an Evaluation and Monitoring System

In Chapter V we have discussed Objectives - Broad Goals and Specific Objectives - Tacit Assumptions and Pre-Conditions, and the Baseline Situation. In this appendix, we enter into the more detailed, technical elements of an evaluation and monitoring system.

#### Time Dimension

Having set the objectives of a project, a fair schedule should be set up, against which actual progress may be measured as each milestone is passed on the path toward attainment of objectives. Due to human mortality and technical progress, the process of education is never-ending. But the more limited objective of raising trade unionists to specified higher levels of knowledge and skill may be set for a relevant period. This period might be set at four years, in so far as, in Egypt, trade union elections to fill their officer posts occur every four years.

This fact (of elections periodically) is one among many arguments to justify multi-year planning of the project and commitments to it. Another argument is that a number of discrete actions inherently require more than one year to achieve. For instance, the construction of a hall of residence for students beyond commuting distance from Cairo, at the Workers' University, has taken well over a year from the design stage through to complete occupancy of a fully equipped and furnished building.

It includes some additional lecture rooms for the university and a guest house for short-stay workers (a means of income generation), and is a most useful addition to workers' education, well supported by the different donors.

This also illustrates the concept of fairness in scheduling as a basis for accurate evaluation. To fail to complete and occupy such a building within a target of one year or less is not a failure; to fail to do it in five years might more reasonably be rated as a failure.

Another aspect of the time dimension to be considered in our evaluation is the factor of delay and slowdowns due to causes outside the control of the entities being evaluated. For example, the completion and occupation of the student residence at the Workers' University was delayed by a dispute with the building contractor whose work was not fully acceptable. Another example: the Coordination Office was less active in Phase II than in Phase I because the Representative sensed that it was politically necessary, vis-a-vis the Egyptian Trade Union Federation (ETUF) to adopt a low-profile posture. ETUF itself had been straightening out a temporary schism within itself which was a hangover from the replacement of its chief officer. No foreigner would have been wise to become enmeshed with this.

### Indicators

At the core of an evaluation are the indicators selected as reliable and measurable signs of progress toward project objectives. Indirect indicators relate to the project inputs delivered and applied. Direct indicators relate to the project outputs and their impact on the economic, social and (in the case

of this project) the political situation of the beneficiaries and their country.

In the next chapter we discuss some indicators on which data were available to us. Here we suggest a larger, more adequate list of them that could be documented in future.

Regarding project inputs, there are:

- Availability of funds, in the time and place required. This indicates the efficiency of the donor and of those who process the delivery of funds and, if delayed, helps to justify delays in project extension;

- Expenditure of project funds, broken down by object of expenditure. If not properly accounted for, vouchered and reconciled, this only indicates either carelessness or worth corruption on the part of the project management.

- Appointment of staff and the relevancy and adequacy of the qualifications of those appointed.

- Rate of activity of the staff: working full-time or less;

- Purchase, presence and operation of equipment. This may be visited to be seen operating, and serving project purposes (e.g. computers crunching project data). Condition of equipment can be compared with its age. Adequacy of arrangements for maintenance and repair can be verified. Major items can have their operation, output and down-time (repair, or waiting for repair) systematically logged.

- Managerial activities. The project is implemented under the oversight of AACL/Washington (AFL-CIO) and the project Coordination Office in Cairo headed by the AFL-CIO. Some system could be devised to measure this activity. Numbers of visits by

Washington staff to Cairo, size of Cairo staff and division of their working time between their office and the institutions visited in Cairo and elsewhere in Egypt (inc. travel log) and between administrative and substantive activities (the office's role includes provision of technical assistance).

- Regarding the direct indicators, relating to the project outputs, a selection may be made from the following. (This is an ideal compendium of data-gathering in this chapter: cost of providing each type of data should be weighed against its relative usefulness and significance.)

- Mileage per quarter per vehicle, if possible broken down by main types of use: e.g. transport of trainees, of project personnel, of equipment, of supplies.

- Books and pages of educational materials printed per annum, with titles, and income where sold, and cost of free distribution.

- Seminars and courses held per annum, by numbers and by attendance (trainee days in total and by sex if significant); broken down by subject areas and by locale (in Cairo, in Alexandria and elsewhere).

- Language proficiency - number of trainees gaining specified certificates of proficiency in English, French, etc.

- Library expansion - total books held and percentage increase per annum, with separate indication of textbooks and language books and number of books (if any) given away to students. Number of subscriptions to periodicals. Separate figures might be given for materials printed in Arabic, English, French and other languages. Also, how much of this literature is

in Cairo and how much in other places: how many publications, if any, in the 53 workers' education centers around the country.

- Computer output - significant printouts: major data sheets and documents; number of bytes of memory storage (hard and floppy discs) utilised, if possible broken down between computer program files, administrative files, accounting, correspondence and educational files.

- Visits to U.S.A. - Number of visitors, and of person-days, in total and by sectors (e.g. by national unions, and by the subject-matter divisions of the W.E.A./W.U. Institutes); places in the U.S.A. visited. Appreciation and individual reports by each student at the end of each visit, with answers to a questionnaire.

- Education in U.S.A. - Numbers of students, field and university of study and degree sought/obtained.

- Other international visits by Egyptian trade unionists, to which countries and international organisations and meetings.

- Significant professional placements and advancements gained by trade unionists who have participated in AALC sponsored international/national training and study courses and visits.

- Annual up-dated registry of faculty members (W.U. and W.E.A.) showing their number, sex and summary of relevant qualifications.

- Quarterly activity reports by AALC Coordination Office to USAID Cairo. Giving quantitative data and qualitative statements on the value and impact of various project activities. It is expected that Coordination Office staff will in each period both participate in, and attend, a sample of seminars and courses. An indication could be given of the division of their

working time between oversight of funded projects, attendance at union meetings, technical assistance provided to unions, courses taught for the Workers' University and Institutes and the national unions, etc.

When considering the feasibility of this monitoring and evaluation system, the following should be borne in mind:

(i). Project computers can be used for this purpose and are already to some extent (e.g. data on courses given now kept by W.U.); Technical assistance is envisaged in developing a management information system with the computers;

(ii). For employment policy reasons, all Egyptian institutions have plentiful staff, with spare time to gather and feed data into the computers;

(iii). The AALC Coordination Office appears to have some under-utilised capacity.

(iv). What USAID would like to know should be known by the project management for good management anyway, and some of the fields of data suggested appear to enter into any confidential or "sensitive" areas.

The whole edifice of evaluation and monitoring should be considered an ideal; much but not all of it would be far better than the present situation in which we do not see too much in backward glimpses through the mists of time and memory.

It should be stressed that in view of the frequent changes of personnel and entities concerned with this project on different sides, good institutional memories sustained by a sound and well-structured information and documentation system are essential.

## APPENDIX B

### The Education Development Center Inc.

(USAID Contractor)

The Education Development Center Inc. (EDC) is an international project management corporation committed to working collectively with institutions in the Third World on problems of development. Since 1958, EDC has successfully managed a portfolio of over \$225,000,000 in U.S. and international development projects. It has a full-time staff of 112 professionals and annual revenues in excess of \$10 million. EDC has worked in more than 60 countries in Africa, Asia, the Carribbean, Europe, Latin American and the Middle East.

EDC continue to assist policy-makers and planners preoccupied with designing workable hypotheses and building well managed projects to address issues in numerous program areas, including basic education, vocational and technical training, educational technology, distance learning, film and video production, ~~social~~ marketing, management training and private sector development, manpower development and planning, evaluation, health, nutrition and agriculture, participant training, institution building and technology transfer.

EDC Inc., 55 Chapel Street, Newton, MA 02160, USA; telex 922476

## APPENDIX C

### EGYPT

#### SCOPE OF WORK

##### Objective

To assess the impact of activities carried out under annual grants to the African-American Labor Center (AALC). This five-year assessment will document and evaluate the relevance of project inputs and progress toward the achievement of project outputs, as well as provide recommendations on future assistance, its magnitude, time period and focus.

##### Background

In 1987, AALC requested a multi-year grant to support its activities in Egypt. USAID/Cairo decided to provide support through January 1989. As part of this support, a segment was set aside to allow time for a comprehensive evaluation of past programs, that would provide information on which, along with other informed data, a decision for multi-year funding could be based.

The conclusion and recommendations which result from this evaluation should serve as a data base for making decisions on future multi-year support.

##### Scope of Work

1. Document and evaluate the quantity and quality of project inputs. What progress has been achieved in Technical Assistance on Union Leader needs. Has the training in the U.S. been useful, and has there been a follow-up on those who have returned? Have the commodities been all received and utilized effectively? Were these inputs necessary and sufficient to achieve the project purpose?
2. Assess progress toward the achievement of project outputs. How many individuals have been trained? In what sector and skills? What has been/will be done to upgrade trainers? What are the costs per trainee? What has been the effect of U.S. training on the development of the Egyptian labor movement? Has AALC activity achieved objectives concerned with increasing the capacity of Egyptian labor unions to provide members with needed services?
3. Evaluate the likelihood of institutionalizing programs introduced under previous grants. Are the programs and instructional material sufficient/relevant to the needs of the ETUF? Is the Workers' University an effective counterpart? How can institutionalization be enhanced? What other new ideas can be included in the coming years?

4. Describe progress toward an enhanced role for Egyptian Unions in the effort to achieve a better life for Egyptian workers. Has there been a training system developed? Will the willingness/ability of different companies to design and implement training programs in Safety and Health be improved? Has union leadership been made more effective?
5. What has been the role of the donors, and what are implications for past and potential future AALC role.
6. What lessons can be learned from implementation thus far? Make recommendations, if necessary, of changes that would enhance project success.

#### Team Composition and Responsibility

Over a three week period a three person evaluation team, two Americans and one Egyptian, will meet with AALC, ETUF and AID members in order to understand existing rules and requirements of the organizations and to evaluate the past program and to give advice on what activities can take place over the next four years.

The American members will include one union specialist and one non-union general evaluation specialist. A general knowledge of unions and union leadership is desirable for the evaluation specialist. An Egyptian general union specialist team member will be hired in-country.

Evaluators are expected to submit a summary of findings prior to their oral debriefing to the Mission and the Ministry of Manpower and a draft report at least five days before their departure date. Based on the comments and questions raised in the debriefing and in response to the draft report, the team will revise and complete its final report, to be submitted to USAID/Cairo prior to departure of the team leader from Egypt.

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industrial democracies abroad, especially in Scandinavia and West Germany, base much of their international activities on Government grants as a matter of right.

In the descriptions of the Institutes that follow their sources of income have been included. The figures used are those for the year 1987, being the most recent complete figures available.

The 1987 figures, while representative, cannot be used as indicators for previous or subsequent years, since there are alterations from year to year. Full annual financial (and program) reports of the Institutes are available from either the Institutes themselves or from the AFL-CIO Department of International Affairs.

## AIFLD

The American Institute for Free Labor Development is an outgrowth of links between the American labor movement and Latin American unions going back to the beginning of this century. AIFLD was established in 1962 by the AFL-CIO—with special support from the Communications Workers of America—in furtherance of Gompers' vision of effective trade unionism as the path for Latin American workers to break out of their poverty and exploitation. Originally a part of President Kennedy's Alliance for Progress, the initial AIFLD arrangements involved joint management-labor direction. Management participation was later eliminated. AIFLD today maintains 17 field offices throughout Latin America and the Caribbean.

AIFLD's 1987 income was as follows:

THE AFL-CIO ABROAD

SOURCE	AMOUNT
National Endowment for Democracy	\$ 1,326,811
Agency for International Development	
General grant	9,237,000
Cooperatives (El Salvador)	2,500,000
Operational program grants	
Costa Rica	322,940
Ecuador	139,855
Panama	148,350
Honduras	82,000
Guatemala	516,690
Other	
Haiti	206,700
Grenada	176,800
AFL-CIO	230,000
<b>TOTAL</b>	<b>\$14,887,146</b>

**AALC**

The African-American Labor Center was founded in 1964. In the early sixties the AFL-CIO vigorously supported the struggles for national independence in Africa. Once independence was gained, the Federation moved to support free and democratic trade

THE AFL-CIO ABROAD

union movements that could contribute to nation-building and the defense of democratic values. The AALC has developed a wide-ranging program of assistance throughout the continent: it maintains 15 field representatives in Africa, 4 with regional responsibilities, and works with local unions in 45 countries of French-speaking, English-speaking, and Arabic-speaking Africa.

The AALC is also charged with carrying out the AFL-CIO's Program of Action in Support of Black Trade Unions in South Africa. The AFL-CIO has given outspoken support over thirty years to the black trade union movement in South Africa, and provides assistance to a broad cross-section of those unions.

AALC income for 1987 was as follows:

SOURCE	AMOUNT
National Endowment for Democracy	\$ 780,533
Agency for International Development	
General grant	3,125,000
Sudan supplement	480,000
South Africa	875,000
AFL-CIO	216,500
<b>TOTAL</b>	<b>\$5,477,033</b>



AALC supported African Institute of Higher Trade Union Studies' seminar on the role of women for the National

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## AAFLI

The Asian-American Free Labor Institute was founded by the AFL-CIO Executive Council in 1968 to answer the needs of democratic trade unions in Asia and the Pacific for assistance. Its programs stretch from the Eastern Mediterranean to the South Pacific, and trade unionists from some thirty Asian and Pacific countries are involved in them. The Institute has 8 field offices in Asia and the Pacific, covering a dozen countries, and conducts programs in five others from its Washington headquarters.



*Inoculation program in the Philippines.*

AAFLI's 1987 income:

SOURCE	AMOUNT
National Endowment for Democracy.....	\$1,195,277
Agency for International Development General grant .....	3,700,000
Philippines supplemental AID legislation .....	1,250,000
AFL-CIO .....	130,000
<b>TOTAL</b> .....	<b>\$6,275,277</b>

## FTUI

The Free Trade Union Institute was created in 1977 primarily to develop projects and programs between the AFL-CIO and European unions—especially the Portuguese and Spanish trade unions then newly emerged from government control. With establishment of the National Endowment for Democracy in 1983, a bipartisan private entity formed by private groups including the AFL-CIO, the U.S. Chamber of Commerce, the Democratic and Republican Parties, and now funded by the Congress, possibilities for work by the AFL-CIO in free trade unions without regional restrictions were significantly increased. (To simplify administration, FTUI presents to NED the program proposals of the other AFL-CIO Institutes as sub-headings of its own proposal.)

NED funding available from 1983 on to FTUI has been of great value to embattle democratic unions worldwide. An outstanding and vigorous example is the AFL-CIO's continuous support for Poland's Solidarnosc free trade union federation. FTUI also supports research on human and labor rights.

FTUI income (excluding, of course, the NED grants to the other three Institutes) for 1987 was as follows:

SOURCE	AMOUNT
National Endowment for Democracy .....	\$ 1,511,000
AFL-CIO .....	85,000
<b>TOTAL</b> .....	<b>\$ 1,596,000</b>

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SUMMARY OF SOURCES:  
ALL INSTITUTES

NED .....	\$ 4,814,371
AID .....	22,760,335
AFL-CIO .....	662,000
TOTAL .....	\$28,236,706

*NOTE: Not all income received by the Institutes is spent on Institute programs. Each Institute also supports union-to-union activities abroad by AFL-CIO affiliates. This support is detailed below under the heading, International Trade Secretariats.*

## Our International Relations

**T**he second form of American labor's active involvement in international affairs is its relationships with international and other national labor organizations throughout the world in order to solve mutual trade union problems and to advance democratic values. To these ends, the AFL-CIO works with the following:

**International Organizations:**  
**International Labor  
Organization (ILO)**

The return of the United States to the ILO in 1980, after an absence of three years, revived

APPENDIX E

AGREEMENT CONCERNING  
THE EGYPTIAN TRADE UNION DEPARTMENT IN  
ALL  
THE AFRICAN AFFILIATED TRADE UNIONS  
COVERING  
TECHNICAL COOPERATION IN WORKERS' EDUCATION  
AND  
RELATED FIELDS

This Agreement is made between the Egyptian Trade Union Federation (hereinafter referred to as "ETUF",) and the African - American Labor Center (hereinafter referred to as "AALC",) a technical assistance organization incorporated in the United States of America and representing the American Federation of Labor and Congress of Industrial Organizations (AFL-CIO).

WHEREAS, this Agreement aims at further developing the technical cooperation between the AALC and the ETUF,

NOW IT IS HEREBY AGREED as follows:

#### ARTICLE I

-----

The AALC shall undertake, subject to the availability of funds, and the agreement of the ETUF regarding the details of the technical cooperation programs, to assist the ETUF's Workers' Education Association in its various programs and to assist other activities of the ETUF, including the provision of equipment and services for these programs.

#### ARTICLE II

-----

The assistance provided by the AALC under the terms of this Agreement will normally include the following :

- (a) The donation of materials and equipment required for the successful implementation of training projects. This equipment will become the property of the institutions with which the program of assistance is associated;
- (b) The provision of scholarships and fellowships to enable Egyptian workers' education instructors to receive training and post-graduate education in related training centers and universities in the United States of America;
- (c) The provision of technical advisers to those institutions covered by this Agreement, according to their needs and requests. The AALC will assume all financial responsibilities.

(d) The secondment, in case of necessity, of a liaison officer to coordinate all aspects of technical cooperation regarding the implementation of agreed-upon programs. The salary, allowances, and transportation costs of all technical personnel will be met in full by the AALC.

ARTICLE III

The ETUF shall ensure the concurrence of the Government of Arab Republic of Egypt as to the procedural matters necessary to the implementation of this Agreement, including the provision of necessary exemption from taxes and import duties.

IN WITNESS WHEREOF the respective representatives of the parties have hereunto set their hands :

\_\_\_\_\_  
On behalf of the Egyptian Trade Union Federation (ETUF)

Date 19/8/1987

*M. A. - Stawick*

CHAIRMAN OF BOARD. (ETUF)

*Stawick & Powell*  
\_\_\_\_\_  
On behalf of the African-American Labor Center (AALC)

Date 25/2/87

*mes*  
*[Signature]*

## APPENDIX F

### CONTACTS OF THE MISSION

In chronological order, our contacts in Egypt (10 September-2 October) were as follows:

Jerry J. Wood, Director, Office of Education and Training, USAID  
Peter Kresge, Project Officer, Education, USAID  
William G. Gelabert, Associate Director, Human Resources, USAID  
John Patterson, Deputy Director, USAID/Egypt  
Michael J. O'Farrell, Representative, African American Labor Center, Cairo  
Eurad El Din Hassan, Director General, Workers' Educational Association and Director of the Workers' University  
Geboy Gebremariam, Representative, Sudan, AALC  
Ahmed Abd El-Salam Zaki, Administrator, Department for Economic Cooperation with USA, Ministry of International Cooperation  
Mark J. Sievers, First Secretary, American Embassy (Labor Reporting Officer)  
George Flores, Office of Private Sector Activities, USAID  
Mohammed Hassan Eid, Chairman, International Department, ETUF, President, Postal Workers Union  
Mustafa Ibrahim, Deputy Chairman, International Department, ETUF, General President, Hotel and Tourist Workers Union  
Atef Ebeid, Minister of State for Cabinet Affairs and Minister of Administrative Development  
Assam Abdul Haq Saleh, Minister of Manpower and Vocational Training  
Ahmed al-Ammawi, President, Egyptian Trade Union Federation and President, General Trade Union of Chemical Workers  
Christine Street, First Secretary and Education Officer, British Council, (Administrator of EEC assistance to the Workers' University)  
Nagui Abdalla, Projects Officer, British Council  
Osman M. Ahmed, Director, ILO/UN, Cairo  
Hisham A. Fahmy, General Manager, American Chamber of Commerce in Egypt  
Nadia M. Lamloom, Membership Liaison, American Chamber of Commerce in Egypt  
Ajit S. Dutta, C.P.A., President, Datex, Inc.  
Amal Nassar, Project Officer, Education, USAID  
Abdel Salam Ayad, Deputy Director General, Workers' Education Association  
Abubakr Gadel Mawla, National Union of Health Workers  
Ahmed El Amawi, President, Egyptian Trade Union Federation and President, General Trade Union of Chemical Workers  
Dr. Mohamed Nassar, Dean, Labor Management Institute, Workers' Education Association

Mr. Gofar, Tutor, Workers' Education Association (and  
teacher of most worker educators in Egypt)

Other persons interviewed without name made available:

Director of International Relations, Workers' Education  
Association

Regional Director, Workers' Education Association

Professor of Economics, (female Ph.D.), University of Cairo  
(?), Tutor, Workers' Education Association

Director and Two Tutors, Alexandria Residential Center,  
Workers' Education Association

Dean of the Worker Education Institute, Workers' Education  
Association

## APPENDIX G

### Rise and Development of Workers Education in Egypt

In Egypt, as well as in other countries, workers education started at a latter stage after the rise and development of the Trade Union Movement. In 1917 there were 17 unions in Egypt, associated with the National Party, leading the national liberation movement. The National Party managed to secure the allegiance of existing trade unions in towns, as well as to introduce the cooperative movement in rural areas. The peoples schools established by the national party could not be considered as working education centers, because they were meant to function as ordinary primary schools free from the influence of the government and the colonial authorities.

After the end of World War I and the break up of the 1914 revolution, the Egyptian Trade Union Movement flourished, and the number of trade unions increased to 42 unions. The first Federation of Trade Unions was established in 1921 with a membership of 40,000, at the same time and in association with, the Egyptian Socialist Party. This party changed its name to the communist party, and was then prohibited by the Government, after it had organised a pro communist general strike in Cairo and Alexandria. (See "The Arab Trade Union Movement," Abdel Moghny Saïd, Labour, No. 7, May 1972, page 6.)

The Egyptian Federation of Workers was then re-organised and associated with the Wafd Party, a democratic majority party created by the leaders of the 1919 Revolution. All during the period 1927-1942, the trade unions and their federation were acting as de facto organisations, without legal recognition. Law

No. 85 of 1942 concerning trade unions, while providing legal recognition of the trade unions, omitted any reference to the Federation of Workers. It neither permitted nor prohibited the formation of such a federation. In practice, it was impossible to form a unions federation under the administrative registration system of labor organizations which was imposed by that law.

It was the Egyptian Government which took the initiative to introduce workers education facilities. A section concerned with workers education was established in 1950 in the Labor Department, Ministry of Social Affairs, under the name "Section of Trade Unions Guidance and Orientation" to acknowledge trade unionists with their rights and to encourage trade unions to promote and organize their trade union and provide social services.

It was only after the 23rd July 1952 Revolution, that such a new section would play a positive role in the field of workers education. For two years its activities were limited to publishing a few manuals and booklets about formation, administration and finance of trade unions, together with organizing few lectures. On 7th December 1952, the section established the first trade union training center in Cairo, providing four evening courses per week, for one month. The success of that center, encouraged the State to establish other centers in Alexandria and the big industrial towns.

Two big trade unions, of the Textiles and Petroleum workers, established their independent institutes for workers education. This was the modern beginning of workers education in Egypt. In 1957, a decree was issued to form a committee to sponsor a workers education organization responsible for trade union

training centers. The committee was formed of nine members: three workers representatives, two adult education experts from the Ministry of Education, two experts from the Labor Department, one professor of education from the Ein Shams University, and the director of the International Labour Office Cairo branch. In order to have its views and recommendations on the real needs and prospects of the trade union movement, the Committee launched five pilot projects in five trade unions, printing, tram, textiles, petroleum, drugs and chemicals. The Committee submitted its report recommending the establishment of a Workers Education Association, and outlining certain general principles for its function and aims.

In 1960 Presidential Decree No. 2253 was issued, inaugurating the Workers Education Association, on 16th October 1961. The association started with existing trade union training centers, and a new Institute for Trade Union Studies and International Labor Relations. The number of workers education centers soon increased, reaching 52, centers in big towns in industrial centers. New institutes were established to afford specialised courses for union leaders, elected worker members on boards of directors, workers members on safety committees, etc. These Institutes are:

1. Institute of Trade Union Studies
2. Institute of Social Insurance
3. Institute of Labor Economics (training elected workers members on boards of directors)
4. Institute of Safety and Industrial Hygiene
5. Institute of International Labor Relations (I.L.O.)

Regional and International Workers Federations - WFTU, ICFTU, ICATU, etc.)

6. Institute of Workers Education to train the staff of the WEA and improve educational methods by refresher courses for educational directors and instructors
7. Institute of Population Education (family planning aims and methods)

#### The Workers University

The Workers University was inaugurated on May First 1983, to provide higher specialised courses in main labor fields of study. Such courses are long-term and more detailed than those provided by the seven above mentioned Institutes. They deal with practical labor affairs and problems, more than purely academic subjects. The Workers University was not to be a new academic University to be added and devoted for student workers. Workers students have access to all academic universities which are all free, and open to all citizens on the principles of equality and equal opportunities. The programs and courses of the Workers University were elaborated by a group of Egyptian and foreign experts with the help of ILO and UNESCO. The recommendations of the experts were discussed and approved by a Workers Education Conference held in October 1978. The Workers University began with two faculties:

1. Faculty of Trade Unions Studies, consisting of four branches
  - a. Branch of Trade Union Management
  - b. Branch of International Labor Relations
  - c. Branch of Workers Education
  - d. Branch of Labor Information

2. Faculty of Labor Economics consisting of four branches

- a. Branch of Labor Management
- b. Branch of Social Insurance
- c. Branch of Industrial Safety
- d. Branch of Labor Cooperatives

A fifth branch is missing. This is amazingly the branch of Productivity, highly recommended by the group of experts as a most important, and most needed, field of labor economic studies. Needless to say, it is essential to re-include this branch in the Labor Economics Faculty.

Need to speed up the accomplishment of the Residential Bloc

Almost all courses of the Workers University are supposed to be residential to enable students to concentrate and devote their time for study. The Residential Bloc of the University is still under construction. Students find difficulty getting transport to and from the University, and most of them fail to be punctual. It would be rather difficult to provide for Pan African or Pan Arab Courses without the Residential Bloc facilities.

# APPENDIX H

A List Of The Equipments

Bought

By The AALC For The Workers' University

From: 1983 - 1986

Serial	Description	Amount	Cost L.E.	Total
1	Movie Projector	2	1461.400	2902.800
2	Lamps (spare part) cinema	12	16.892	202.704
3	Lamps (projector)	12	22.960	275.520
4	Copier	2	3152.900	6305.800
5	Ink for Copier	8	50.184	401.472
6	Ink for Copier	2	46.494	92.988
7	2 Boxes, with 10 Boards each	2	30.750	61.500
8	Slides set	2	337.020	674.040
9	Suction Fan	2	63.960	127.920
10	Voltage Adaptor 220/110	2	88.560	177.120
11	Lamps for the suction fan (spare parts)	12	19.967	239.604
12	Transportable Screen (Cinema)	2	84.460	168.920
13	Electrical Typewriter	4	1500.000	6000.000
14	Book-binding eq. 6 Book Covers	3	233.333	700.000
15	Calculator	4	250.000	1000.000
16	School Bus	2	22500.000	45000.000
17	School Bus	2	20500.000	41000.000
18	Chevrolet - Car	2	150.910	30182.000
19	Printing Equipment	1	10829.710	10829.710
20	Loyalty Statue	1	1.000	1.000
21	Coloured Television (20 inch)	2	720.000	1440.000
22	IBM Computer	1	62775.000	62775.000
23	Exposure Set for Printing	4	113910.300/113910.000	
24	Mechanical Copier	1	58344.300	58344.300
25	Role for Calculator	12	1.000	12.000
26	Copier (Master Copying Machine)	1	2650.000	2650.000
27	Head for the copier	1	450.000	450.000
28	Wrapping equipment	1	4000.000	4000.000

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29	Paper Shredder Equipment	1	2700.000	2700.000
30	Paper fastener Equipment	1	6000.000	6000.000
31	Automatic Paper Cutter	1	6900.000	6900.000
32	Language Educational Set	1	37154.684	37154.684
33	Copier (Sharp)	1	5900.000	5900.000
34	Exposure Set for Printing	1	4500.000	4500.000

45,3079.<sup>0</sup>382 L.E.

453,079.082 L.E.

1.	1	LANGUAGE LAB
2.	1	PRINTING SET
3.	1	PAPER SHREDDER
4.	1	PAPER FASTENER
5.	4	BUSES
6.	2	MOVIE PROJECTOR
7.	2	TRANSPORTABLE SCREEN
8.	2	SUCTION FAN
9.	4	ELECTRICAL TYPEWRITER
10.	1	EXPOSURE SET FOR PRINTING
11.	1	CALCULATOR
12.	20	BOARDS
13.	1	COMPUTER
14.	4	WRAPPING SET
15.	1	PAPER CUTTER
16.	1	MECHANICAL COPIER
17.	2	CARS
18.	2	SLIDES SET
19.	2	VOLTAGE ADAPTOR
20.	1	EXPOSURE CHASSE FOR PRINTING
21.	1	TELEVISION 20 INCH
22.	1	MASTER PREPARATION SET



التاريخ :

الموضوع :

رقم : NOV 1984

كم رقم :

الارقات :

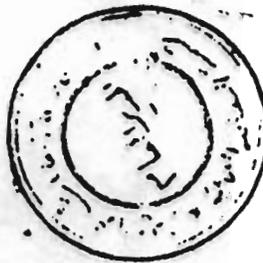
AFRICAN-AMERICAN LABOR CENTER

CAIRO - EGYPT

Gentlemen:

This is to confirm that we have received the following equipments and vehicles from the African-American Labor Center:

- 4- Buses and 2-Vans plus spare parts
- 1- Simultaneous Interpret Equipment
- 2- Table copiers
- 1- Binding Machine
- 6- IBM Typewriters
- 8- Electric Calculators
- 1- Offset Duplicator
- 2- Slide Projectors/Screens
- Carousels/Supplies
- 2- Overhead Projectors/Supplies
- 2- Sound Projectors/Supplies



Sincerely yours,

Abdel Mequid El-Demal