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1. Phone interview with Mr Dykes, Minerals and Energy Counselor, SA Embassy, Washington, DC, May 1986.
2. Information material from the South Africa Foundation, Washington, DC.
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4. Ibid.
5. Information material from the South Africa Foundation, Washington, DC.
6. Draft White Paper 22 the Energz Policz g; the Regublic 9; South Africa, Energy Policy Committee and the SA Department of Mineral and Energy Affairs, 1984.

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8. Ibid.

1981-1982, Shipping Research Bureau, Amsterdam, June 1984, p. 28, and South Africa's Survival Techniques, Business, April 1986.

10. Ibid.

11. Ibid.

13. An Enetgv Profile, Energy Survey, Supplement to the Financial Mall, May 1:, 1983.

14. Secret Oil Deliveries to South Africa 19

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Bureau, Amsterdam, June 1984, and Oil aanCticns: Sout; link , Dr. Martin Bailey, London 1981, p. 16.

15. Interview with Mr. John Montgomery, Deputy Director, South Africa Foundation, Washington, DC, May 1986.

16. Draft White Paper 22 the Energx Policx g; the Regublic 9: South Africa, Energy Policy Committee and the SA Department of Mineral and Energy Affairs, 1984.

17. Fuelling A2artheid-- Shell Egg 222 Military, a report by the World Council of Churches, Christian Concern for Southern Africa, Christians Against Apartheid, and the Catholic Institute for International Relations, based on research by Dr. Martin Bailey, 1984. -

18. Ibid.
19. Ibid.
20. Ibid.

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21. Ibid.

Bureau, Amsterdam, 1984, p. 28.

23. Ibid, p. 17.

24. Ibid, p. 1.

25. Ibid, p. 2.

26. South Africa's Survival Techniques, Business, April 1986.

27. Fuelling Apartheid-- Shell and the Military, the World Council of Churches, Christian Concern for Southern Africa, and the Catholic Institute for International Relations, based on research by Dr. Martin Bailey, 1984.

28. Oil Tankers to South Africa 1980-1981, Shipping Research Bureau, Amsterdam, 1982, p. 29. -

29. Fuelling Apartheid-- Shell 229 E22 Militarz, the World Council of Churches, Christian Concern for Southern Africa, and the Catholic Institute for International Relations, based on research by Dr. Martin Bailey, 1984.

30. Ibid.

31. Secret Oil Deliveries to South Africa 1981-1982, Shipping Research Bureau, Amsterdam, 1984, p. 1.

- :2. Fuelling Apartheid-- Shell and the Military, the World Council of Churches, Christian Concern for Southern Africa, and the Catholic Institute for International Relations, based on research by Dr. Martin Bailey, 1984.

33. Ibid.

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 (Hehir; Lambert)
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 NATIONAL COUNCIL OF CHURCHES OF CHRIST
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 BANTU - Black
 UNITED CONGRETATIONAL CHURCH IN SOUTH
 AFRICA

The Union of American Hebrew Congregations is a national association of the congregations of Reformed Judaism. They send observers to the major ecumenical Christian bodies such as the WCC and NCC, according to their Washington office.

The Roman Catholic Church does not belong to either the WC: or the NCC but sends observers; major Protestant bodies and ecumenical groups also send observers to large Roman Catholic deliberative gatherings, and some, such as the Episcopalians and Lutherans carry on regular conversations aimed at reunion of the churches.

The World Council of Churches is headquartered in Geneva, Switzerland, but has a U.S. office.

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e Dutch Reformed

The South African Council of Churches is the ecumenical body in South Africa and a consistent critic of the government's racial policies. The White and Black Churches (NGK and NKK) do not belong.

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The Churches' Emergency Committee on Southern Africa is an outgrowth of both the WCC and the NCC and is headquartered at 475 Riverside Drive, Room 612, New York, New York 10115-6956

The Interfaith Center on Corporate Responsibility is an organ of the NCC and is also located at 475 Riverside Drive, New York, New York. Timothy Smith is the Director. Looking at the chart of churches and religious bodies, it is important to know that within denominations there are Ciose -relationships among churches in the U.S., Europe and South Africa and a conStan: xchange cf csmmUhications and perscehel.

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There is a formal relationship between the American Episcopal Church and the Church of England; there is no formal relationship between the United Methodist Church in the U.S. and the British Methodist Church.

While Reformed Churches have strong theological ties and some formal relationships, namely the World Reformed Alliance, the two White Dutch Reformed Churches in South Africa (NGK and NHK) have been expelled from the W.R.A. since 1982 and almost all major Christian bodies have condemned their theological justification of apartheid as heretical.

Political Scenarios

On the subject of South Africa, there are no firm political bets. The current internal political situation, and its external implications, are fluid and unstable. The political future of South Africa, and of apartheid, is the hostage of equal uncertainty.

Therefore, the neptune strategy is not premised on unqualified assumptions about that future. Rather, five possible

A political scenarios have been considered in developing the strategy. These scenarios describe possible processes of political change over the next five years. They do not describe an end point in terms of the nature and tenor of the resultant South African political nation-state, for that entity will be a product of a considerably longer period of time.

Some scenarios may, at this point, seem more likely than others; but, given the emotionalism that drives the political

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3. Gradual Change I: Government Participation in Change

4. Gradual Change I : Political Diffusion

at War and Revolution

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1. No Political Chance .

The first possibility, of course, is that nothing fundamental changes in South Africa over the next five years. The South African state re-exerts its control totally over the country, and a generation of black South Africans is crushed in the process. The "emergency" thus is eliminated, and the status quo of _ apartheid as it has been known in the past (up until recent

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forms) is maintained.

The current likelihood of this scenario coming to fruition is small. Many changes have been undertaken in the last six months which make a return to untainted apartheid unlikely. These changes, themselves, have been instituted, in part, because of widespread opposition to apartheid among segments of the white population and within world opinion. Abrogating those changes would create intense controversy and opposition. . nevertheless, the white political right is powerful in South

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2. Sudden Political Chance

A second scenario has the current South African government effectively caving in, and a successor political regime coming into power. This could result from a conscious decision on the part of the white minority that the price of conflict is too high, and a choice to exchange the white social place for a secure geographic place within South Africa.

This scenario, while not likely, is not outlandish. There is widespread recognition within South Africa's white minority that change is present in their political and social structure? However, the it would be difficult to implement such a "deal" between the white minority and the black majority, for there are no leaders on either side of the political table who can deliver their rank-and-file en masse. This is as true of white leadership

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influence are extremely diffused and
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fractionated.
There would be little confidence or trust of such a sudden change either within the minority or within the majority. And trust that the "deal" would be honored totally would be crucial to its negotiation.

3. Gradual Change I: Government Participation in Change

This scenario envisions white-led, government-controlled -u age in apartheid, with the current minority government continuing to run the country.

This scenario is essentially the continuation of the trend of the past two years -- a struggle forward with every step and such change would be led by skilled party politicians, with each change taking time to be achieved and time to be implemented. The emphasis would be on buying time for political stability, and on focussing change on those aspects of apartheid that can easily be reversed should vehement opposition develop.

In this scenario, "busy time" can be spent in change, thus occupying the energies of both black and white opposition.

Violence will occur, but can be absorbed within this pattern of constant debate and incremental change.

External pressure and repeated internal violence becomes the engine within this scenario, with a result that, over five years,

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4. Gradual Change II: Political Diffusion

In this scenario the current government remains the

"government in power", but in reality it is only one of the various factions controlling the land and the people. The government loses control over some geographic areas of South Africa, and the nature of politics becomes highly diffused. As a result, the minority government is forced into power-sharing. Grass-roots support become important national political actors, thereby intensifying the diffusion and the Violence.

The five year period, therefore, sees continued stumbling forward in reforms in an effort to satisfy increasingly powerful but complex majority interests and in response to expanded violence. But, the political stage becomes crowded, confused, and unstable, marked by continual negotiations but few agreements.

E5. War and Revolution

The final possibility, of course, is that the next five years

I see a continued escalation of violence without expanded white-black dialogue. This is especially likely if Botha falls from power and is replaced by the military which responds with force to violence and black demands.

This violence is accompanied by a geographic consolidation of white populations into "townships" with a decision within the Afrikaner population to fight the ultimate battle.

Such a revolution resulting in civil war would inevitably lead to the involvement of outside powers, with the front-line states, the Soviet Union, the UN, and the U.S. (probably in that order) entering the conflict.

This scenario would currently appear unlikely for three reasons. First, the minority government controls enough power to

keep the violence from coalescing and escalating. In addition,

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emergence of a black leader committed to this course and around whom all blacks could unite. Such a person is not now present on the South African stage.

However, the military holds the key to this scenario, and its position on South Africa without Botha is uncertain.

RELIGIOUS GROUPS STRATEGY

I. ANALYSIS

. The religious community in the United States, uneven though its history may be, has played a singular role in shaping the emerging patterns of racial justice in this country. From the abolition movement of the 19th century through the civil rights movement of the 1950's and 60's, voices of religious conscience have been influential in the story of our nation. Regional attitudes have been changed, laws have been passed and history has been redirected because religious conscience and energy have been applied to matters of racial and political injustice. That same conscience and energy are now being applied in a critical way to the apartheid policies of the South African government. Churches have traditionally identified and articulated ethical and moral positions based upon their faith understandings and commitments. Though some constituents object to the "politicization of the pulpit," an equal or larger number, look to their religious leaders for guidance and counsel. Mobilized members of religious communities provide a "critical mass" of public opinion and economic leverage that should not be taken lightly.

It can be assumed that as long as apartheid continues as the official policy of the Republic of South Africa, Shell South Africa's presence there will be offensive to and attacked by many religious and ethical persons in the U.S. The Royal Dutch Shell Group has taken the position that it plans to stay in South Africa. The churches represent the "critical mass" of opposition. If they join the boycott and pressure for disinvestment, it will become a radically different and far more costly problem than it now is.

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There are five objectives for the religious group

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to give the churches and religious agencies such

reasons not to join the boycott. (Given the ethical/geo-political/emotional ramifications of the apartheid issue, this may be only partially successful.)

2. To encourage indigenous South Africans, church critics and responsible activists to engage with Shell South Africa and the Royal Dutch Shell Group in helping to develop some of the programs and post-apartheid plans

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for South Africa that will ensure the continuation and growth of the Shell companies in the United States and in South Africa, while acknowledging and addressing some of the specific needs and legitimate goals of the majority of South Africa's residents in establishing a stable post-apartheid society.

3. To develop a Task Force to prepare an exhaustive statement concerning Shell South Africa and the Royal Dutch Shell Group policies and practices related to South Africa. This Task Force would be made up of South African leaders, ethicists, church leaders, American activists and corporate executives. This process would need to be carefully guided. (See "Breakthrough" section)

4. To develop an Advisory Board (perhaps an expansion of the Task Force) to relate to Shell's presence in South Africa. This Board would be authorized by the Royal Dutch Shell Group to monitor its South Africa activities and to provide advice and counsel. (See "Breakthrough" section)

5. To develop a Blue Ribbon Committee (in conjunction with Bishop John Walker's initiatives, if possible) chaired by someone of Mayor Andrew Young's stature, to work with Shell South Africa, Shell U.S., and South African leaders in forging a scholarship/training program designed to prepare Black Africans for post-apartheid leadership roles in South Africa. (See "Breakthrough" section)

It is understood that conversation and relationship with the person and interests listed on the following pages could lead to a refinement of the above and the development of other cooperative endeavors. To engage the experience; Laetitia, churches and critical spokespersons in 1985: - apartheid planning should deflect their attention away from boycott and investment efforts and direct their vision and energy into productive channels.

III. STRATEGY

The Church Strategy is designed to enable Shell U.S. officials and PI executives and consultants to engage ecumenical and denominational religious groups in thoughtfully programmed and well targeted positive conversations and in the development of action programs (see above) designed to attain the company's goals in an ethically acceptable context.

Anti-apartheid dialogue between churches and activists has long been underway. A key aspect of this strategy is to ensure that the Shell companies can counter that unbalanced situation by establishing their own meaningful dialogue with these crucial church groups so that churches perceive their anti-apartheid options in a more positive, creative sense than simply joining the Shell U.S. boycott.

IV. TACTICS

The tactics discussed below are designed to ascertain which religious groups are most likely to be involved in the Shell U.S. boycott, determine their leadership, engage in conversations and negotiations with this leadership, establish contacts with the constituencies, and enlist cooperation in efforts by the religious institutions and the Company in making plans for a more constructive role in South Africa now and in the future.

Initially, contacts will be made with the following persons and institutions who are already involved in varying degrees:

The charts on the following pages present the organizational relationship for all groups discussed in the remainder of this strategy paper.

A. The World Council of Churches (WCC)

1. Hold preliminary conversations with the General Secretary, Dr. Emilio Castro (JA on June 4, 1986) to determine his willingness to help facilitate conversations with South African religious leaders and to enter into meaningful dialogue with top business executives to exchange views and to explore possible areas of cooperation.

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implementation tar. Cascro is the key to huch of the religious Strategy.)

3. Keep in touch with the Rev. Ms. Joan Campbell, 0.8. Director of the WCC, in order to keep current with the actions and attitudes of that organization in the matter of the boycott and other actions affecting multinationals like Shell.

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RELIGIOUS BODIES

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THE ANGLICAN COMMUNION

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General Secretary

PROVINCES OF THE ANGLICAN COMMUNION-30 PROVINCES AND

CHURCH OF ENGLAND

CHURCH OF CANADA 1

- Avchblshop 01 Canterbury - Prlmale 01 Canada . Presiding Bishop

Ruben Runcle Edward Scoll Edmund Blowning

44 Dioceses 30 Dioceses - Execulive Council

119 Dioceses

Notes:

1. These provinces are autonomous; are in communion with the
Archbishop of Canterbury and with each other; individually and
voluntarily participate in World Council of Churches.

2. Confer on matters of mutual concern at Lambeth Conference--
bishops only-every 10 years; through Anglican Consultative
Council on ongoing basis through representatives.

3. Form a close network of mutual support in terms of mission strategy and public issues.

4. Whole communion consists of 396 Dioceses throughout the world
with 81,000,000 members. Africa is steadily growing area and locus of
much alienation.

EXTRA-PROVINCIAL DIOCESES

EPISCOPAL CHURCH (U.S.)

0 Archbishop of Southern Africa 1 Archbishop ' - etc.

Present Philip Russell Moses Scull

Elect Desmond Tutu mphases, etc.

0 Republic of South Africa

17 Dioceses

- "Independent Homelands"

- Transkei

- Bophuthatswana

- Venda

- Namibia

- Lesotho

' Swaziland

- Mozambique

' Island of St. Helena

0 Ascension Island

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MAJOR BLACK DENOMINATIONS

BAPTIST

National Baptist Convention. U.S.A. Inc. Progressive National Baptist Convention, Inc.
President T.J. Jemison President Marshal L. Shephard
Baton Rouge, Louisiana Philadelphia, Pennsylvania
National Baptist Convention of America
Presldam E. Edward Jones
Shreveport, Louisiana

METHODIST

African Methodist Episcopal Church African Methodist Episcopal Zion Church
Bishop Henry Murph Bishop William Small
Senior Bishop Senior Bishop
Los Angeles, California Mobile, Alabama
Christlan Methodist Episcopal Church

PENTECOSTAL

The Church of God in Christ World Wide, Inc. Bible Way Church O! Our Lord Jesus Christ!
Bishop J.O. Patterson Bishop Smallwood Williams
Memphis, Tennessee Washington, D.C.

Notes:

- The Yearbook of American and Canadian Churches (1986) does not give membership for these denominations.
- The statistics indicate which is the largest of the denominations listed.
- A law of the Baptist churches are aligned with the American Baptist Convention as well as these black denominations.
- 0 The Methodist denominations are related to the World Methodist Conference which meets in Nairobi, Kenya this July.
- 0 These denominations do not utilize national staff as do the predominantly white denominations. Much of their social action is expressed through SCLC, NAACP and Operation PUSH. The President or Senior Bishop wield a great influence.

REFORMED CHURCH IN AMERICA
 Edwin Mulder, Gen'l Sec'y UNITED KINGDOM
 Bernard Thorogood, Ccn'l Sec'y
 PRESBYTERIAN CHURCH
 James Andrews, Stated Clerk UNITED FREE CHURCH OF
 UNITED CHURCH OF CHRIST
 Avery Post, Executive
 HUNGARIAN REFORMED CHURCH
 SCOTLAND
 David Roy, Gen'l Sec'y
 REFORMED CHURCH
 WORLD ALLIANCE OF REFORMED CHURCHES
 DR. ALAN BOESAK, PRESIDENT
 147 MEMBER CHURCHES : 70,000,000 MEMBERS
 UNITED REFORMED CHURCH IN THE DUTCH REFORMED MISSION CHURCH-NGSK
 Alan Boesak, (Coloured)
 NGKA 0 (African)
 J.M. Lebone, Moderator
 REFORMED CHURCH IN AFRICA-(Indian)
 PRESBYTERIAN CHURCH OF WALES DUTCH REFORMED CHURCH-NCK (White)
 L.D. Richards, Clerk
 Expelled from NARC in 1982
 Not associated with WCC
 W
 NETHERLANDS REFORMED CHURCH
 R.J. Mooi, Gen'l Sec'y
 REFORMED CHURCHES IN THE
 NETHERLANDS
 H.A. Kruyswijk, External
 Relations
 IN AMERICA
 Rt. Rev. Dezso Abraham CHURCH OF SCOTLAND
 Angus Morrison, Prin. Clerk PRESBYTERIAN CHURCH OF AFRICA-(Black)
 Samson Khumalo, Chief Clerk
 CONGREGATIONAL UNION OF
 SCOTLAND PRESBYTERIAN CHURCH OF SOUTHERN
 Robert Waters, Gen'l Sec'y AFRICA
 NOTES: . I.C. Aitken, Gen'l Sec'y
 1.
 Reformed and Presbyterian churches
 are Calvinist bodies having an
 ecclesiastical polity whereby
 the church is governed by presbyters.
 Reformed churches are the second
 largest Christian body after the
 Roman Catholic Church.
 The white Reformed churches in
 South Africa have been declared
 heretical by most major churches
 and have been expelled from the
 World Alliance of Reformed Churches.
 REFORMED PRESBYTERIAN CHURCH IN
 SOUTHERN AFRICA (Black)
 G.T. Vika, Gen'l Sec'y
 UNITED CONGREGATIONAL CHURCH OF
 SOUTHERN AFRICA
 Joseph Wing, Sec'y
 TSONGA PRESBYTERIAN CHURCH (Black)
 ETC

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ii 4. Arrange for a European meeting of top officials of the Royal Dutch Shell Group with Dr. Castro and key WCC leaders (about August 20-31, 1986). The purpose of this meeting will be the mutual understanding of current positions and the laying of a groundwork for future mutual efforts to end antagonism and misunderstanding between the Church and the international business community. Plans for the Task Force, Advisory Board, Blue Ribbon Committee and the Notre Dame Project (see "K" below) will be shared. Similar meetings will be arranged at the proper time with leaders of the National Council of Churches and with the heads of key denominations.

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5. Commit the Shell companies to a thoughtful and constructive follow-up; e.g., the involvement of the WCC in the selection and make-up of the Task Force and Advisory Board (see Objective B:1&2), established for the purpose of charting an ethical course for Shell South Africa at the present and in the post-apartheid period.

B. The Church's Emergency Committee on Southern Africa (CECSA)

This committee is sponsored by the National Council of the Churches of Christ, (NCC) and is co-chaired by two U.S. clergy, the Rev. Avery Post of the United Church of Christ and the Rev. Lorenzo Shepard of the Progressive National Baptist Convention. The tactics associated with it are two-fold.

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2. Hold preliminary conversations with Dr. POST (JA)

and Dr. Shepard (as soon as cleared by Shell U.S. - GC) to determine their agendas regarding Shell U.S. and to explore areas of cooperation in resolving the intention to boycott and in planning for a new South Africa.

a

L. The National Council of Churches (NCC)

1. The most significant person in the NCC to be contacted is Dr. Arie Brouwer, General Secretary of the NCC. He is a former General Secretary of the Reformed Church in America and former Deputy General

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Secretary of the WCC. He considers the Dutch Reformed Church in South Africa heretical because of its attempt to give Biblical and theological support to apartheid, and he has placed South African issues at the top of his personal agenda. He will be contacted (as soon as cleared by Shell U.S. - JA) for the purpose of learning about his stance regarding the Church/South Africa/Shell issues. His cooperation in these issues will be sought. Contact will be made with Bishop Philip R. Cousin, President of the NCC and an African Methodist Episcopal Bishop, to see if he can be enlisted to play a constructive role in resolving the targeting of Shell U.S. for a boycott (as soon as cleared by Shell U.S. - GC). His cooperation will also be sought in initiatives later on, aimed at providing leadership for a post-apartheid South Africa. Contact has been made and will be maintained with Dr. Kenyon Burke, Associate General Secretary for Church and Society, who has indirect responsibility for the South African issue within the NCC, in order to keep informed about NCC initiative among the churches regarding international business and especially the Shell companies. Contact has been made with Willis H. Logan, Director of the Africa Office, and he is forwarding NCC materials to PI as they are produced. His involvement in the CECSA makes him a key person to be cultivated in order to keep abreast of CECSA initiatives and goals.

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ICCR is in complete sympathy with, and is supportive of, the Shell U.S. boycott according to Tim Smith, its Executive Director. However, it has not yet formally endorsed the boycott. Because ICCR played such a significant role in the resolution of the Nestle boycott, they will be approached for assistance in the resolving the Shell U.S. boycott (as soon as cleared by Shell U.S.). Building on a previously established relationship of mutual trust, Pl will attempt to enlist and include Smith in the development of win/win strategies such

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as the recommended Notre Dame program (see: K below); the appointment of the Task Force and Board (see Objective B:1&2) and in work with well-known ethicists (see:N.1). f

EgiscoEaI/Anglican Leadership

The Episcopal Church is very important because of its close linkage with the world's Anglican communities, especially in South Africa. Any intervention in the boycott by the Anglican Church in England could have serious repercussions on the Episcopal Church in the 0.5. and on the Anglican Church in South Africa.

1. The Walker Initiative

Bishop Walker feels that uncoordinated industry initiatives in South Africa are often ineffective and lack direction. He wants to bring together a number of CEO's of major U.S. companies doing business there with significant church and civil rights leaders to plan an agenda to present to Tutu, Boesak and other significant South African leaders as a major coordinated, well-publicized effort that the South African government could not ignore and which would provide a new focus for activist and business interests. The Walker Initiative would explore issues such as:

a. What can be done to prepare Black South African leaders to rule themselves and what can the companies do to help that happen?

5. What can be done beyond the Sullivan Principles, which the companies could announce with South African leaders to the press and the government in South Africa, which would show complete disagreement with apartheid publicly and which would constitute a new business public policy dealing with South Africa?

c. What governmental pressures can be applied in the 0.5. and in European countries with companies in South Africa toward accelerating the pace of reform and change?

2. The support of the recently installed Presiding Bishop of the Episcopal Church, The Most Reverend Edmund Browning, the Reverend Charles Cesaretti, Deputy for Anglican Relations, and the Rt. Rev. Paul Moore,

Bishop of New York, will be sought in resolving the Church/Shell conflict and in building bridges toward a more just society, congenial to the ethical practice of business, in South Africa. (as soon as cleared by Shell U.S. RDP; PC, JA). Positions adopted by the General Convention and the Executive Council of the Episcopal Church, or proposed for adoption, will be explored with the purpose of heading off conflicts with Shell U.S.

3. A meeting or meetings with Desmond Tutu will be sought. (as soon as cleared by Shell U.S.) As the most visible Church opponent of apartheid in South Africa, and as the South African church leader best known in the world outside South Africa, his attitudes toward the Shell companies and the boycott are critical. His cooperation will be sought in finding a constructive role for multinational companies like Shell to play in changing South African society. Since he is under a lot of pressure to take ever stronger anti-apartheid stands, securing his help will not be easy.

4. Utilizing U.S. Episcopal contacts, an approach will be made to appropriate leaders of the Church of England, perhaps even to the Archbishop of Canterbury, to seek their assistance in working with their own church and the churches in Southern Africa, to reduce conflict and engender cooperation with Shell South Africa and others who are committed to a just society in South Africa in which business could be a positive force.

British and South African Methodist Churches

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Methodist Church of Southern Africa (M
largely: multiracial denomination in South
Africa, a strong opponent of apartheid, and the
St denomination to espouse the "one person, one
vote" (Methodist Conference, 1978) idea. Its
leadership is openly hostile to the Botha regime and
has taken many bold positions. Key leaders are:
M. Stanley Mogoba, President of the Methodist Church
of Southern Africa; Abel Hendricks, twice President
of the Church, and now Chairman of the Cape Good
Hope District; Theodore Coggin, editor of Dimension;
Andrew Losoba, Vice-Chairman of the Kimberley and
Bloemfontein District and former President of the
Church; and Freda Hendricks of the World Methodist
Council. Mrs. Winnie Mandela is also a Methodist.
These persons need to be part of the evolving
strategy.

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Kenneth Greet, former president of the British Methodist Church and George Thomas, long-time speaker of the House of Commons, popular Laborite and outspoken Methodist lay preacher, will be enlisted to assist in establishing ties to the South African Methodists. Thomas will also be approached about dealing with British trade unions. Given the fact that the British Methodist Church has just divested itself of its 1.6 million pounds sterling investment (22\$, BGG shares) of Shell Transport, contacts with this church are essential.

U.S. Catholic Conference (U.S.C.C.)

Conversations will be held with Father Bryan Hehir (Peace and Justice), Monsignor George Higgins (labor union specialist), and Father Rollins Lambert to ascertain the attitudes, positions and intended actions of the USCC regarding South Africa, the multinationals and the Shell boycott (as soon as cleared by Shell U.S.). If they propose to participate in the boycott, attempts at negotiating a different stance will be sought.

The help of the USCC will be sought in making contacts with the Roman Catholic Church in South Africa (Southern Africa Catholic Bishops Conference - SACBC, the third largest church in South Africa), to ascertain their attitudes towards foreign investment and the role that is played, and/or could be played, by foreign investors in reforming that society. A good relationship to the SAGE: should prove Dene 'cial in dealing with the SSCC and its member chu '

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Because the Dutch Reformed Church in South Africa part of the Reformed tradition, and because of the strength of the Reformed churches in Holland and their role in the WCC, and because of the tensions in that faith group on the issue of apartheid, it is deemed critically important to establish ongoing contact with the RCA through the Rev. Edwin Mulder, its General Secretary. (as soon as cleared by Shell U.S. -J.A.). The object would be to ascertain their stance vis-a-vis the boycott, disinvestment, the role of multinational companies in South Africa and their own aspirations for post-apartheid society, in which the companies could play an important role.

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I. The United Church of Christ

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This denomination has historically played a very activist role in all issues having to do with race and economic justice. Their President, Dr. Avery Post, is also co-convener of CECSA and a vigorous activist. It is very important, even if prospectively difficult, to establish and maintain a dialogue with this religious body and their primarily spokesman, and this should be undertaken at the earliest feasible opportunity.

J. The Church in Holland (JA, GC, PC)

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Working closely with the WCC, contacts and conversations need to be developed between the Royal Dutch Shell Group and the Reformed Churches in Holland. (September or October 1986) Sensitivity on the part of the Royal Dutch Shell Group to the theological issues separating the South African Dutch Reformed Churches (the Nederduits Hervormde Kerk van Africa and the Nederduits Gereformeerde Kerk van Zuid Africa - both suspended from the World Alliance of Reformed Churches for the heresy of apartheid in Ottawa in August, 1982) from its sister Reformed communions around the world needs to be underscored.

PI, working independently and through the WCC, can help bridge the gap between Pax Chzisti (a long time critic of the Royal Dutch shell Group) and the Shell companies making possible constructive dialogue about the role of Shell South Africa in a post-apartheid society.

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Key figures at Notre Dame, namely, Father Theodor Hesburgh, the President and former chairman of : U.S. Civil Rights Commission, who has spoken out against divestment, Father Oliver Williams and Lee Tavis of Notre Dame's School of Business Administration (Department of Management), have close ties to the South African business community. Williams is completing a book for Harper and Row on business in South Africa. Shell U.S. could offer to

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participate with other corporations and foundations in the funding for-an "Institute" at Notre Dame focused on giving thought and shape to a post-apartheid government and society in South Africa. (November or December, 1986) (See also the Breakthrough Initiatives section of this document)

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L. Denominational Executives

1. David W. Preus, Presiding Bishop of the American Lutheran Church and a member of the WCC Central Committee, could be approached (as soon as cleared by Shell U.S. - JA) and would be a significant person in dealing with the Namibian aspect of the South African situation since Lutherans predominate in Namibia.' The churches opposed to the South African regime especially resent the role of the South African government in Namibia. Preus is active in the CECSA which is working for comprehensive economic sanctions against South Africa. (JA)

2. Bishop John Hurt Adams of the African Methodist Episcopal Church, (Washington, D.C.) and founder/president of a large and influential national organization of Black churches could be a significant resource in communicating with and gaining the understanding and cooperation of Black churches in the United States. It can be anticipated that these churches will be sympathetic both to the boycott and to moves toward sanctions and divestment. Contacts will be made, as soon as cleared by Shell U.S. (JA, GC)

3 The Rev. James Andrews, States Clerk of the Presbyte:-an Church (U.S.A , needs :3 0e contacte: and his cooperation sought in fc:esta-;11; the participation of this influential denomination 1b the boycott. (as soon as cleared by Shel l .S.) Tae Presbyterian Church in South Africa is important because of its historic ties to the Dut ch Refor ed Church there and its growing role in the Black population. It has adopted a moderate stance on the investment question. We need to ascertain the stance of the American Church and seek their cooperation. (GC)

4. Bishop Roy Sano, President of the World Division of the Board of Global Ministries of the United Methodist Church, Isaac Bivens of the African desk of that Board, Randy Nugent, General Secretary of United Methodism's GBOGM and their counterpart in

other major denominations should be encouraged to become part of an information network concerned with the churches' relationship and attitudes towards corporations, local and multinational, in South Africa. Informal conversations should be developed when opportune. A concentrated effort should be made by PI executives and consultants between October and December, 1986 to contact these people. Shell U.S. should keep them informed and, when appropriate, consult with them either directly or through PI. They might well be included in periodic information-sharing regarding the plans, policies and commitment of Shell South Africa. (JA, GC, PC) (A "newsletter" from Shell could be circulated among these persons and a developed mailing list of 109-126 people on a bi-monthly basis beginning January 1, 1987.)

Audrey Smock is a U.C.C. staff member who has been involved in the UN hearings on transnational activities in South Africa and Namibia. She is very influential in the social action circles of the mainline denominations and it seems desirable that PI consult with her and keep her informed in ways that are favorable to our goals (as soon as cleared by Shell U.S. - RDP, JA, GC). PI has worked successfully with Audrey Smock in the past.

Blue Ribbon Committee (see: II 5)

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Atlanta can be expected

for anti-apartheid, per -b 2.

home base of Coretta Scott King, Joseph Lowery (SCLC), Hosea Williams and other Black activists. The mayor, Andrew Young, is an ordained UCC clergyman and a former staff member of both the UCC and the UCC. As a former Ambassador to the United Nations and as an aggressive and successful mayor of a major southern city, with close relationships with the business community on the one hand, and strong anti-apartheid commitments on the other, he could be strategically very important in Shell's efforts to forestall a national boycott. Shell U.S., either alone or in cooperation with other transnationals, might offer to sponsor and fund a Committee whose purpose would be to plan for and train leadership for a post-apartheid South Africa. Mayor Young should be asked to chair such a Blue Ribbon Committee, to assist in the selection of its members and to include in it some of the pro-boycott critics of Shell. In all such efforts, there must be prominent South African representation and participation. to be a major focal point of boycott activity. '

At an appropriate time, this Committee, working in conjunction with Shell U. S. might establish a project at the Georgia Institute of Technology for training future South African business and industry leaders. (see also, Breakthrough Initiatives section of this document).

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N. Leon Sullivan

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Dr. Leon Sullivan, author of the Sullivan Principles, serves a Baptist Church in Philadelphia and should be approached and dealt with as a church leader and Black activist as well as the author of his now famous principles. Sullivan has a congenial and cooperative relationship to Castro of the WCC. Dr. Sullivan could be a powerful advocate for the positive role of business in South Africa. Shell U.S. needs to find ways to express its support for the intent of the Sullivan Principles, even though it may not be an appropriate signatory, and find ways to relate those commitments to the EEC Code of Conduct subscribed to by the Royal Dutch Shell Group. (See suggestions in other sections of this Project.)

0. The South African Council of Churches (SACC)

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GC,PC)

Bishop Desmond Tutu and Dr. Alan Boesak, head of the World Alliance of Reformed Churches, are both influential leaders in the SACC and are known as aggressive moderates. Actions on both sides of the apartheid issue are pushing the. toward more radical stances. Shell South Africa needs to view them, especial; because of their wcrld- wide in fluence, as mejc: figures in any emerging dialogue between tqcse appos_hg aparthe;d and the business :ommenty -1 South Africa. Ii it ean be ac: omplisned, Chev need tc be utilized in developing a Strategy :0 deal w-tt present realities and poss-apa id prospect . Shell South Africa, in relating to the SACC, will need to involve Black church leaders from all denominations across South Africa in conversations that center on economic and social justice, political and personal freedom and post-apartheid possibilities. (A list of religious leaders with brief profiles is now being developed for PI. This list includes Bishop Tutu's successor with the

SACC.): Specific goals and projects should result from these continuing dialogues. If the schedules of South African leaders permit, RDP, JA, GC and perhaps, a Shell U.S. executive should make a two week trip to South Africa in July or August to establish a personal relationship with Shell South Africa and to relate to the Black leadership and the South African business community. This mission should be accomplished as soon as possible since it is an essential first step in realizing our objectives.

P. Christian Ethicists

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James Gustafson (University of Chicago), Charles McCoy (Center for Ethics and Social Policy, Berkeley), David Shultz (Trinity Church Center for Ethics and Corporate Policy, New York), Father Oliver Williams (Notre Dame) and others like them can make significant contributions concerning the constructive role corporations can play in the building of a post-apartheid South Africa. They need to be consulted from time to time. (Initial contacts to be made by late Fall, 1986 - JA,PC).

Q. Church Conventions, Judicatory Executive Councils, Specially Convened Assemblies

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PI consultants will attempt to ascertain meeting times and potential agenda items and impending resolutions and actions by church agencies and clergy/lay groups that might affect participation in a boycott of Shell U.S. or prescribe disinvestment or other pertinent activities. These are the loci of position-taking, policy-making; actions by the churches. We will attempt to deal with these issues before they happen, rather than respond to them ex post facto.

I.

UNION STRATEGY
ANALYSIS:

A. Summary of Facts as Reported

On January 9, 1986, acting at the request of the International Confederation of Free Trade Unions (ICFTU) and following a mail ballot of its Executive Council, the AFL-CIO in conjunction with the Free South Africa Movement (Randall Robinson), the United Mine Workers, the National Organization of Women and the National Education Association launched a nationwide (U.S.) boycott against the products of the Shell U.S. Company. It was further stated that the request of the ICFTU for such action was initiated by South Africa's National Union of Mineworkers (NUM) and the Mine's International Federation following a strike last year at a shell-owned mine and subsequent labor practices by the mine management. Within a week of the boycott's launch, the NUM stated that while it favored pressure against international companies employing anti-labor practices, 't did not prescribe or recommend a U.S. boycott of Shell products.

Although the allegations of unfair and repressive labor practices provided the initial rationale and legitimacy for the AFL-CIO action, they stated that the fundamental objective of this boycott is to place economic pressure on the Shell Group so that it would curtail, stop or otherwise change its investments and operations in South Africa, which it contends, are tantamount to direct support for the Pretoria government and apartheid. The action by the AFL-CIO Executive Council establishes the policy for the 32 unions that are the Council members, but also for 65 other unions that are affiliates of the AFL-CIO. The United Mine Workers (160,000 members), and the NBA (1.7 million members) are independent of the AFL-CIO. AFL-CIO affiliated unions

presently encompass around 14 million workers. The clear majority of these workers belong to the largest 20-25 affiliated unions. The AFL-CIO Executive Council represents the largest unions and a cross section of the industries or occupations that are organized. Despite the fact that in theory the boycott enjoys the support of all the AFL-CIO unions plus the NBA and the UMWA, a National Labor Shell Boycott Committee was formed to provide leadership and structure to the boycott. Its membership is as follows:

B.

Presidents Owen Bieber, UAW; Richard Trumka, UMWA, co-chairs.

Members: Gerald W. McEntee, AFSCME; Albert Shanker, Teachers; Frank Drozak, Seafarers; Lynn R. Williams, Steelworkers; John J. Sweeney, SEIU; Frederick O'Neal, Actors; Murray H. Finley, ACTWU; William H. Bywater, IUE; Vincent R. Sombrotto, NALC; Alvin E. Heaps, RWDSU; Sol C. Chaikin, ILGWU; Morton Bahr, CWA; John A. Gannon, Firefighters; Alfred J. Smith, MESA; Bernard Butsavage, Molders; C.E. Wheeler, Carmen; John E. Lawe, TWU; Howard Samuel, IUD, John E. Mara, Union Label.

This committee represents those individuals and unions most interested in and committed to the boycott. But it can be safely predicted that the level of interest varies enormously among the individuals and their respective organizations.

Summary of Facts as Learned

With this background in mind, the more subtle and interesting facts and motivations can be unraveled.

First, it appears that, within the labor community, Rich Trumka and the UMWA initiated the idea for the boycott.

In fact, all the direct funding (\$150,606) and most of the organizational support (25 staff members) for the boycott activities have been provided by the UMWA. The American Labor and Education Center headed by Matt Witt, former aide to Rich Trumka, has been the operating entity that has planned and executed the boycott program, which has three basic components:

1. an educational campaign based on printed material

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preparation and distribution, and

3. presentation;

2. news media coverage; and

3. community organizing.

Forty cities were selected as targets. At the end of March, only seven had been visited, although these seven do include some of the largest media markets in the country. The boycott uses a generic model for the target cities, including rallies, speeches, op-ed articles by boycott leaders placed in local newspapers, and visits by organizers to Shell U.S. dealers.

Beyond the UMWA, the UAW and AFSCME are the most active unions, although their activity has not included significant direct financial assistance. Only merst in-kind support, such as help in the production and distribution of radio actualities at the rallies has been forthcoming. Most trade unions and other members of the coalition have used their own news letters, bulletins, and regularly scheduled meetings and conventions to communicate with their members and staff about the boycott.

At this juncture, it appears that the UMWA is the engine running the organized component of the boycott, and that the initial \$159,090 has been spent. Further, most observers in the labor community believe that the primary first stage motivation for the UMWA's leadership in the boycott was the difficulty encountered with the AT Massey Company and a broader concern about cheaper foreign coal eroding markets for U.S.-produced coal. Secondly, the evidence suggests that the AFL-CIO decision to participate in the boycott was predicated on four factors: 1) the UMWA's request for their participation and hopes that such support could bring the UMWA closer to affiliating with the AFL-CIO; 2) the close working relationship between the AFL-CIO and the Free South Africa Movement built during the protests and acts of disobedience at the South African Embassy in Washington, D.C.; 3) the long-standing relationship between key labor leadership and the civil rights organizations in the United States; and 4) a generic and intense concern ove' human rights and worker rights and the importance 0' ee trade unions in the e retention of demo: is governments.

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II. OBJECTIVE

The primary objective of the union strategy is to prevent labor boycott efforts from expanding to new unions, and to bring about an inactive or almost inactive boycott.

III. STRATEGY

To achieve this objective discussions will be initiated and aimed at finding points of mutuality in the objectives of both Shell U.S. and the unions involved. Every effort will be made to ensuze that these discussions are seen not as negotiations (as is common in the labor milieu) but as an exchange ofiideas.

IV.

To undertake this strategy,
or initiatives will be pursued.

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TACTICS

six specific areas of activity

Reitsgruit

Review of the Reitspruit incident will be made, with the aid of Shell South Africa, to ensure that all involved in that labor dispute have been treated fairly so as to remove the incident as a cause of boycott action.

Labor Record - South Africa

A comprehensive analysis of Shell South Africa's labor record and its relationship with the Black unions there will be compiled. As an integral part of this effort, we will obtain, if possible, an endorsement of Shell South Africa from a respected South African Labor leader such as the General Secretary of the National Union of Mineworkers, Cyril Ramaphosa.

Labor Record - 0.8.

A detailed history of the relationship between Shell United States and unions in the 0.8. will be prepared. Attention will be paid specifically to its policies toward promotion and employment of minorities and Blacks.

Ombudsman

2: wi-1 be imperat-ve to select a highly credible "mediator" to intercede with the labor unions on oenelf of Shell 2.3. Someone of the stature of an Edmund Muskie o: a John Dunlop woul; be appropziate. The ombudsman is essential not only to developing union t:us:, but also to ensuring t.at discu sions and exchanges of view are not viewed as negotiations. (See also "Breakthrough Elements" in this document).

Initial Meeting

Using PI's contacts,
the ombudsman and Ken Young,
a meeting will be arranged between
Executive Assistant to the
Young was

He has held

the third most powerful in the
since Kirkland was elected President. It
President of the AFL-CIO, Lane Kirkland.
formerly the AFL-CIO's legislative director.
his present position,
AFL-CIO,

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appears that Young was the pivot point in the discussions and actions leading to the boycott,' including the conversations and arrangement with the civil rights groups with whom he has had a long-standing relationship. ,

This initial meeting would be a preliminary and information-gathering session and would establish the baseline from which other steps could be formulated. Given the complexity of the labor boycott situation, and the close relations between labor and civil rights leaders, development of detailed tactics on the union strategy must await the outcome of this initial meeting. No other outreach to labor should occur until this meeting has taken place. In this type of effort it is critical to establish clear and crisp channels of communication. Eventually, this mediation road will lead to Rich Trumka and the UMWA and possibly to several other labor leaders. In the interim, Shell U.S. should determine who within the company will take the lead on this problem to both guide the ombudsman and be able to represent Shell U.S. directly if and when that is necessary. ,

All union meetings would be documented with Aides Memoires and used in public programs if appropriate and warranted by the level of activity and focus of Shell U.S. All meetings would be coordinated by the Action Group working closely with the designated Shell U.S. liaison.

Further Informational Meetings

After : -e.el of mutual trust has been established with Eouhg, the ombudsman and Young would arrange an informationa; meeting with four to five principal labor participants. These would include Gerry McEntee and Bill Lucy (President and Secretary-Treasurer of AFSCME); Owen Bieher (President of the UAW); Rich Trumka (UMWA); and Morton Bah: (President of the Communications Workers f America). These meetings would involve a senior Shell U.S. official.

Clearly, this multi-union meeting must be carefully structured so that the Shell U.S. agenda for the boycott does not deteriorate to a general set of "negotiations" between unions and Shell. However, the union strategy requires such a disciplined, central meeting focus.

Unlike the church situation, which involves

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auditidualized communication with a wide range of diverse religious leaders whose position on Shell U. S. and the boycott is not yet formed, the union situation involves a more homogeneous group of leaders who have already agreed, however nominally, to participate in the boycott. Therefore, unlike the diffused individualized approach in the church strategy, a more focused, structured strategy is required if the current union gacticipgtion in the boycott is to be contained. Again, what will be sought via this structured approach is not negotiations but rather an accurate union perception of Shell U. S. programs and activities, and a recognition that the role of the Shell Group in South Africa has been misrepresented by boycott rhetoric. Subsequently, similar meetings with a number of other senior trade union staff could be scheduled with the ombudsman. Further, as a logical element of this tactic, targeted mailings and targeted paid media, such as radio, could be directed to trade union households and black households if the boycott activity level rises. Otherwise, these tactics will not be employed.

Points of Mutuality

The informational meetings would be aimed at calming the rhetoric used by the unions and in seeking points of mutuality. Such points of mutuality might involve union training programs for Black South Africans, with which Snell could cooperate, education programs or Other effsrts being undertaken by O.S. or Black Souzh African n ans.

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is working w: th South African labor to improve skills and labor/management relations could be essential to neutralizing AFL-CIO support for the boycott, and, as a consequence, to dampening the boycott position of the NBA and AFT.

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UNIVERSITY STRATEGY ANALYSIS

A. The Apartheid Issue

Apartheid has become a major focus of attention on college campuses. In addition to emotional intensity and political complexity, the apartheid issue carries with it a complicating frustration: dismantling apartheid and granting political rights to South African Blacks is largely outside the control of the United States. This frustration generates a further lashing out, a desire to do "something, anything" no matter how remote its chance of resolving the problem.

This frustration is further fed by widespread campus dissatisfaction with the Reagan Administration's "Constructive Engagement" policy, and a lack of substantive contact with those U.S. businesses which are struggling to deal with the apartheid issues and to contribute to change in South Africa. This latter corporate concern and effort so far has been only marginally appreciated on campuses where the corporate focus has rested mainly on divestment and disinvestment.

The ensuing vacuum in political and economic leadership has created opportunities for many ideologues to channel campus unrest in directions that have little to do with solving the South African problem.

B. The Immediate Future

It is likely that 1986 will be a critical year both for apartheid in South Africa and for campus unrest in the United States.

The situation could even worsen in subsequent years if the South African government does not take substantive anti-apartheid measures. Thus the flow of events influencing Shell U. S. on the university campuses is largely outside of its control. Nevertheless, the impact of events on campuses will lead to greater focus on U.S. corporate roles in South Africa as one of the only pressure points available to students to express their apartheid concerns. One immediate impact on Shell U.S. may be among those students Shell wishes to recruit for professional employment. In addition to a corporate focus, 1986 will probably see broadened involvement of faculty and students in such concrete activities as boycotts and demonstrations.

Even assuming progress in dismantling apartheid by 1989, there remains the substantial problem of establishing a place and role for Shell South Africa in post-apartheid economy and society. In the current period, Shell 0.8. has a tremendous "window of opportunity" to take initiatives, individually and in concert with other companies, which would serve the best interest of a democratic post-apartheid South Africa, and thereby improve its credibility among U.S. and world opinion leaders. Equally important, for the first time in the eyes of South African non-whites, the institutions of private enterprise could be firmly placed on the side of democracy, individual freedoms and rights.

C. Nature of the Academic Community

Before setting out the strategy for university relations, it is important to have a clear understanding of the nature of the institution itself. That institution is defined here as the academic community, not the university. The distinction is fundamental to our understanding of the problems inherent in dealing with this amorphous constituency. Unlike a corporation where both the organization and those who work for it share a commonality of purpose, a university and its academic community are not one and the same.

Like the corporation, the university has an identity of purpose, a social mandate, and a community image. However, unlike a corporation, the goals of the university are not easily defined in precise and measurable terms, because they involve abstract objectives, such as the pursuit of knowledge and excellence and the transmission of that knowledge to society.

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Hence, there are a number of

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f the business community

he academic community.

1. University Administrators

The university administrators have only limited scope to channel the intellectual resources of a university. They can influence only indirectly the direction of faculty research that is pursued. Even the criteria for quality of research are established and judged by the faculty themselves, particularly external faculty or peer reviewers.

2. Organizational Structure

The organizational structure of a university is collegial; i.e., decisions are made through a collectivity of individuals. Decision-making points

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are scattered among various groups. It is common for the decisions of different segments of a university to appear to be at cross purposes.

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3. Goals

Because university goals are abstract, various faculty members espouse ideas, advance theories and offer solutions that may be quite different from each other. This continuous process of debate is considered normal and healthy. In a corporation, such a state of affairs would be viewed as inimical to the corporation's best interests.

4. Professional Image

In the corporate community, the prestige, social status and sense of professional achievement of an executive are closely identified with that of the firm. In the academic community, scholars identify their goals primarily with professional peers within, but particularly outside, the university where they work. In fact, local prestige and stature are often derived from external recognition. The university is primarily a place of work, not of image and loyalty. The reward system of an academician and indeed the stature of the university are determined by the degree of academic recognition among external peers.

5. Measure of Influence

Scholars' peer stature and influence increase in direct proportion to their success in discovering the truth as they see it, and in challenging the conventional wisdom and institutions of the establishment. '

6. Networks

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The influence and communication networks in the academic community overlap institutional and professional affiliations. Therefore, the individual academic institution is not an appropriate site for developing corporate strategies to build networks with the academic community.

OBJECTIVES

A. Short-Term Objectives

1. Prevent Shell U.S. from becoming the focal point of the anti-apartheid activities which will be carried out on campuses beginning in the fall of 1986.

2. Create a campus environment open to the exchange of ideas and information so that the positions and activities of Shell U.S. and Shell South Africa are viewed with credibility and balance.

3. To deflect attention from targeted actions regarding individual company disinvestment and to set the stage for broader topics such as operating in a police state, possible scenarios for a post-apartheid society, and other issues as they develop.

B. Intermediate Objectives

The biggest and most productive challenge lies in the ability of the Royal Dutch Shell Group to play an important role in developing approaches to a peaceful transition to a post-apartheid state, thereby ensuring for itself a significant role in post-apartheid South Africa.

1. Have The Royal Dutch Shell Company viewed as a company which is approaching a difficult issue with bold and innovative concepts.

2. Diffuse lingering negative sentiments about Shell South Africa.

3. Ensure that the students who study this issue, and the faculty writing about it, are exposed to all the relevant facts necessary for a clear understanding of the apartheid issue as it pertains to a democratic post-apartheid South Africa.

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. 15 a network between Shell U.S. executives and members of the academic community; with an interest in the South Africa question.

Long-Term Objectives

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1. To gain entry into the academic community and transform current notions so that Shell U.S. is viewed positively as a source of ideas and viewpoints rather than simply as a source of financial support for academia.

2. To move away from mutual suspicion and toward trust between Shell U.S. and the academic community.

3. To build bridges between Shell U.S. and various segments of the academic community by encouraging open exchanges of ideas, attitudes, and experiences.

III. Strategy

A. Target Groups

The primary focus of the university program is (1) scholars and teachers, (2) students, and (3) libraries.

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Among scholars and teachers, the academic community has been divided into four groups. These groups are internally cohesive, have similar programmatic and information needs, and, therefore, should be reachable through similar communication networks.

Based on an analysis of academic community interests and the structure of influence within that community, the four target groups are as follows:

- Intellectual Elites and Thought Leaders.
- Emulators and Disseminators of Ideas.
- Young Scholars.
- University and College Administrators.

B. Intellectual Elites and Idea Creators

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Identification

This group includes top academicians, scholars and resource persons, who are widely recognized for their ideas and influence through their writings and public speaking. This category would include elites in business, economic t '

, .ne humanities, social sciences, and even physical and biomedical sciences. This diversity is important. For example, in the humanities, scholars in such disciplines as philosophy, religion, and history, have been notably active in the South Africa debate on questions of values, social ordering, morality and ethics. In the social sciences, scholars have studied potential democratic models for South Africa, the impact of economic/political boycotts on economic growth, and the role of private economic institutions in both supporting and inhibiting apartheid. Biomedical scientists raise questions about the physical and mental health of the victims of apartheid. These are tangible issues that add evidence to less tangible ethical and moral issues.

The diagram on the following page illustrates how ideas become public policy.

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Corporate Management generally becomes aware of and involved in these new ideas after they have become part of the political agenda and are on their way to becoming public policy. A key element of this strategy is to involve Shell 0.3. at earlier stages of idea creation to increase the impact of the corporate viewpoint on South Africa.

Strategies

a. Involve thought leaders in fashioning innovative and feasible solutions to a democratic post-apartheid South Africa and in the search for alternatives to divestment and disinvestment strategies.

b. Position Shell U.S. as helpful to thought leaders in their goal of creating new solutions.

t. Emulators and Disseminators of Ideas

Identification

This group includes the majority of other educators who influence a vast body of students through classroom teachings and who espouse, articulate, and synthesize ideas developed by thought leaders.

Identification of group members can be easily done through membership lists of professional associations, textbook publications, and program participation in the meetings of professional societies.

Strategies

5. Create greater infusion of South Africa-related materials in emulator teaching and writing -1 a manner considered legitimate and enriching.

b. Assist emulators in playing a more prominent role in their teaching and writings through knowledgeable treatment of the South Africa issue.

c. Create greater emulator confidence in Shell U.S. wd.-

activities by emphasizing the concept of a democratic post-apartheid South Africa.

D. Young Scholars

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Identification

This group includes two types of persons: 1) research-oriented junior faculty members who are emerging scholars; and, 2) graduate students with high potential. The primary sources for identifying members of this group are: references from intellectual elites and thought leaders, articles in major academic journals, and papers presented at the meetings of professional societies.

Strategies

- a. Create an environment in which emerging scholars undertake research on some aspect of the South African problem.
- b. Assist and facilitate this research effort.

E. University/College Administrators

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Identification

This group would include: 1) administrators, including senior faculty, from the cluster of colleges and universities in major metropolitan areas where South Africa has become a major issue or where Shell 0.5. has substantial operations; 2) administrators and educators from major national universities who are recognized as leading public figures and statesmen with national stature, and, 3) key deans of liberal arts and law schools, and chairmen of political science, economics, psychology, communications/public relations, sociology, religious Studies departments.

- a. Create greater identification for the colleges in their local areas as institutions with awareness and concern for major societal issues, thus helping to diffuse student hostility against university decisions on their investment portfolios.
- b. Create a more hospitable environment for the activities to be scheduled under Faculty Programs on various campus facilities.

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F. Students

1. Identification

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The problem of communicating with students is complicated by two issues:

a. Anti-apartheid positions on campuses have become well defined. The campus environment is beset by heightened emotional and political activity and anti-corporate sentiments.

b. Most student groups are either controlled or strongly influenced by student leaders who have a radical or left-of-center orientation. In such an environment, even moderate leaders may be reluctant to associate directly with corporate representatives.

Shell U.S. will face considerable hostility--both boycott related and as part of general anti-apartheid actions--on the college campuses in the fall. However, any activities to stem this hostility must be carefully undertaken so as to avoid being portrayed by radical students as an example of corporate efforts to mislead and manipulate students.

.2. Strategy

The basic student strategy is to deflect attention from company-specific actions to broader questions of disinvestment, operating in a police state, and developments pertaining to a democratic post-apartheid South Africa

G. Libraries

University libraries are the ultimate repository of all historical information on a given issue. It is important that these libraries house documents setting out the Shell U.S. perspective so that student and faculty researchers have access to balanced data and analysis.

IV.

Tactics

A.

Intellectual Elites and Thought Leaders

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Network Development

A data base on the leading academicians who are considered molders of campus and public opinion on the South Africa issue will be developed. In the initial stage, contacts with these academicians should be made only through one of their peers; i.e., highly recognized and established scholars. Once the initial contact has been made and solidified, the Action Group should become the vehicle for logistical support and future network building.

Smeosia/Seminars

Elites and thought leaders would be reached primarily through the organization of seminars bringing together academic leaders with their counterparts from Europe, South Africa, and also from selected Third World countries. Four seminars are planned.

a. U.S.-South Africa Seminar

An extremely high visibility seminar limited to about sixteen speakers -- eight from South Africa and eight from the United States. These speakers will represent the top leadership of political, business/labor, academic and religious groups from the two countries. The invited audience would be limited to no more than 106 persons from the 8.5. and Western Europe. The objective would be to create 5 environment for discussing new approaches to a democratic post-apartheid South Africa.

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Shell U.S. could be a sponsor of such a seminar. However, to enlist the cooperation of the U.S. and South African business community, other sponsors should be sought from among the Sullivan Principle signatories in the United States and from the Federated Chamber of Industries in South Africa.

The earliest date for such a seminar would be February 1987, Since seminar development would require six to eight months.

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b. Regional Seminars

-Three other seminars -- one each on the East coast, West coast, Midwest/Southwest -- will be organized. Leading sgpolezs in shese :egions would be commissioneditniwriteworiginal papers on various aspects of the democratic post-apartheid South Africa or alternatives to the disinvestment strategy or both. Each seminar would focus on a specific aspect; e.g., political arrangements, economic development, or the role of multinational corporations. These seminars could be timed between October 1986 and April 1987. '

Senior Neptune executives would attend these seminars to: 1) establish networks with the thought leaders; 2) contribute to the ideas and perspectives of these thought leaders; and, 3) become familiar with new and emerging ideas.

Publications

The material produced in these seminars can be placed in respected academic/professional journals, thereby giving it wider currency. It could also be used as source material for the media.

The material could also be published in book form, to be made available to libraries and students. This would facilitate wider distribution, especially if such books were used as classroom texts.

South Africa Institute

Shell 0.5. should sponsor an "institute, in cooperation with multinational corporations, to study the problems of a post-apartneij democratic SOUth Africa. Shell 3.5. would be clearly seen as selievzn; :ne sys:em will ultimately be different (see further Ji cussion in the Breakthrough Actions section of this document).

Business Conduct Seminar

The Royal Dutch Shell Group should be encouraged to sponsor, through the London School of Economics, a conference on "Appropriate Business Ethics in Doing Business in a Police State." This conference would bring together representatives of European businesses, economists and business professors, and prominent European ethicists. The objective of the Conference would be to develop at least a preliminary consensus of appropriate business practices in such places as Ethiopia and South Africa.

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Emulators and Disseminators

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Seminars

A number of one-day seminars would be organized in a cross-section of campuses across the country. These seminars would be led by a faculty member carefully selected from the host college. The Action Group would assist this faculty member by helping pay the cost of the seminar and arranging to invite a thought leader and a Shell U.S. spokesperson as guest speakers. Student participation and attendance in these seminars would be encouraged.

Case Studies

A series of case studies would be commissioned to examine various areas important to the Royal Dutch Shell Group (disinvestment, MNC investment in the Third World, Shell as an example for the oil industry, etc.). Known authors of upcoming case studies would be approached, as would currently unknown authors, the latter being identified via publishing company contacts. Key business textbook authors would also be approached as potential authors of Shell case studies.

Faculty Awareness

A series of meetings with key faculty members would be conducted personally to ensure that these professors understand the Shell U.S. perspective and to demonstrate that the Royal Dutch Shell Group ' an ethical and caring company, strongly opposed : apartheid.

In a similar vein, trained Shell p.s. sell 15ts would be essential components of approach to scientific faculty such as engineers and chemists.

Classroom Materials

The Action Group would provide textbook and other teaching aids (prepared by the first faculty groups, intellectual elites and thought leaders) at reduced rates for use in their university classes.

Professional Societies

Through contacts established by Shell U.S. among the intellectual elites, South Africa sessions will be developed for the national and regional meetings of

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various professional societies. Participation on the part of well-informed academic experts will ensure a balanced and objective discussion with emphasis on a democratic post-apartheid South Africa. Opportunities will be pursued for Shell U.S. to participate in these meetings.

C. Young Scholars

1. Scholar Exchanges

Working closely with the State Department and the Fulbright Program, the Action Group will facilitate study tours to South Africa by young U.S. Scholars, and assist them in obtaining residencies in selected South African universities.

Similarly, it will facilitate visits of young South African scholars to work with their counterparts in U.S. universities.

2. Research Support

Provide research scholarships, and dissertation research grants, to young scholars working on the South Africa issue. This should be done in cooperation with the guidance of leading members of various academic disciplines.

D. University/College Administration

1. "Town and Gown"

This format for facilitating communications between universities and Shell U.S. would have a distinctly local or regional flavor, with significant involvement of Shell U.S. executives and dealers based in those areas. The program structure, elaborateness, and frequency of contact would depend on the size of the locality, type of academic institutions, and magnitude of Shell's presence. Breakfast or dinner meetings could be organized once or twice a month with the active cooperation of university members, one or two administrators, invited student leaders, local businessmen, and one or two Shell U.S. executives. The university or college in question, as well as the faculty members responsible for organizing these meetings, should be paid an honorarium to compensate for their time and effort.

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The Shell U.S. Public Affairs Department has conducted very successful programs of town and gown meetings and has the in-house expertise to mount them in short order.

Distinguished Lecture Series

This tactic would call for an annual grant of about \$5,006 to each of three or four universities per year. These funds would be used to invite distinguished lecturers to speak on recipient campuses to an audience of students, faculty, and the local community, on some aspect of disinvestment as a strategy or on post-apartheid South Africa. One source of speakers could be from the group of intellectual elites and thought leaders who had earlier participated in Shell U.S. sponsored seminars on South Africa and had developed new material on the topic.

Another source of speakers would be the second group of faculty members; i.e., textbook and case writers, who generally do not get speaking invitations from prestigious sources. By providing them with opportunities to speak before college groups, the tactic would add to their self-esteem and also help in further dissemination of their prepared materials; e.g., textbooks, case studies, etc.

Graduation Speakers

Arrange for Shell U.S. senior executives and Royalties Shell Groups to speak at the graduation ceremony of one or two universities (e.g., the University of Texas) where they can rally the audience behind the goal of finding a solution for South Africa and describe Shell's efforts to do so. The speech should be reprinted and distributed throughout the U.S.

Dealers

A special committee of the Dealers Association could be formed, composed of members who rely heavily on university business. This committee would implement its programs on campus and work closely with the concerned members of the university.

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Student Groups

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Faculty Leadership

The second group of faculty -- i.e., emulators and disseminators of ideas -- will be strongly encouraged to involve students in their program activities. These faculty members would have a strong identity and rapport with the students, having met them through regular academic courses. Senior graduate students who are part of the "Young Scholar" strategy will be encouraged to provide leadership to students in terms of quality research and analysis on post-apartheid issues.

Student Media

A comprehensive plan will be developed as a subcomponent of the media strategy to be directed at media (newspapers, radio, and television) and including:

- a. press release and material distribution;
- b. submitting of articles and op-ed pieces to these publications. '
- c. meeting with key editors and reporters with National Student Association (NSA).

Student Organizations

- a. Dialogue with national student organizations sensitive to the opinions of business should be established. Among these should be: the InterCultural Studies Institute and the Foundation for Student Communications. These organizations should be encouraged to examine issues of divestment on campuses.
- b. The South Africa issue should be discussed at the Foundation for Student Communications Annual Conference in November. A senior Shell U.S. spokesman might offer to address this meeting.
- c. The Action Group should participate or sponsor ISI conferences, seminar, debates such as the May conference titled "The Shaping of the Twentieth Century: Ideas, Events, and Ideologies."

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Mailings and revised materials should be sent out to leaders of important student organizations; e.g., student governments, disinvestment groups, editors of campus newspapers, managers of campus radio stations.

College and University Chaplains

Among the most influential persons on any college campus are the chaplains and student workers placed there by religious bodies. Their independent status on campuses -- they are paid by the religious groups who sponsor them -- enhance their influence. They are prime organizers and frequently are at the center of protest movements with moral dimensions.

We recommend meetings with chaplains on key campuses and with chaplain professional organizations to urge them to consider the positive roles that U.S. businesses have to play in effecting change in South Africa, and in preparing for a morally acceptable post-apartheid society there, and the role they can play in shaping that business influence.

Debate Kit

Working with the National Student Association, Shell 0.5. will sponsor the development of a debate kit on the issues involved in South Africa which will be distributed by the NSA to key student leaders and debate clubs around the United States and be available for all those who wish to become involved in the issue. The debate kit will be honest, factual, complete and will cover all the relevant

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issues at stake in South Africa.

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Media :

Ende: the auspices of Professional Journalists (Sigma Upsilon Chi), Shell 3.3. will sponsor a seminar for the editors of major university newspapers and other key campus leaders on the question of policies toward South Africa. The issues covered will include disinvestment but will also focus on the United States policies in that area and the strategic role of South Africa.

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Internships

Provide summer internships to a small group of students to work in Royal Dutch/Shell Group and Shell U.S. facilities in the U.S. or other parts of

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the world to expose them to the high levels of professional integrity and community concern which Shell managers apply to their corporate operations.

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South Africa Tour

During late August, Shell U. S., in conjunction with two or more other multinational corporations, will sponsor a tour of South Africa :9; 351mL hay gggdent leaders who will develop first- hand experience and exposure to the problems there. Once they have returned, these key leaders will be encouraged to travel to other universities in their geographic area to discuss their experience in South Africa. This first-hand credible, experience will steer the focus onto the larger issues and aid in deterring any tendency to focus on Shell U.S.

r. Libraries

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Bibliograghy

Shell U.S. should encourage the Public Policy Education Fund to produce a comprehensive bibliography which will summarize and list every major article, case study, textbook or government document bearing on the South Africa issue. The bibliography would give them a historical record of the controversy that includes the Shell U.S.'s viewpoint and which diffuses the record over a broad range of considerations. The bibliography would be distributed to all the major university libraries in the Uilized S tat es.

Royal 3c::h/3ne-; Srou; companies 5-; over the world should be encouraged to distribute :h-s material to selected libraries in their host coun ries.

Shell Casebook

Relevant, primary source documents should be compiled, bound, and distributed to university libraries as a Shell Casebook and used for reference of important source documents by researchers.

Materials Distribution

All relevant reports, speeches and scientific materials should be sent to libraries.

EDUCATORS STRATEGY

I. ANALYSIS

Educators have molded the minds and shaped the thoughts of generations of Americans. Classroom teachers, from kindergarten through high school, have passed on their values to impressionable students. They are among the community opinion-leaders.

This traditional role has been eroded somewhat in recent years by a variety of interrelated factors, including the rise of the general level of education and the indifference of teachers to the role of oracle. The growth of teachers unions has also brought about a reduced status in the minds of those who do not equate unions with professionals.

However, the role of the teacher in today's community life remains important -- teachers still influence individual thinking. And as an organized collective force they have tremendous influence on both policy and thought at all levels of American life. It is this potential for wide-reaching influence that makes their support of the Shell U.S. boycott a factor with which Shell must reckon.

A mitigating element of boycott involvement by the National Education Association (NEA) and the American Federation of Teachers (AFT) is its basis in pure ideology rather than in pragmatic teacher interest. By and large, the two organizations have joined the boycott as a concrete demonstration of their vehement opposition to apartheid and racism rather than toward Shell U.S. or because of any relation between the boycott issue and "bread and butter" teacher interests. Basic as that ideological base is, however, there are significant differences in its depth as between the NEA and AFT.

The NEA is a professional organization, much more g-veh :o :onsideratIOh of the merits of issues and much more permeable by outside opinion and influences. In contrast, the AFT is

t primarily concerned with union solidarity, particularly at the rank-and-file level, which will make its boycott decision harder to reverse and more linked to actions by the AFL-CIO. However, even for the AFT, the boycott is not a "bread and butter" issue, and therefore it may be possible to soften the AFT position.

II. OBJECTIVES

Three objectives have been set out for the educator strategy. The first is to reverse the decision by the NEA to support the boycott.

The second is to soften the AFT position and rhetoric in supporting the boycott.

The third is to work with classroom teachers to develop a better general understanding of the apartheid issue and an atmosphere which will foster sympathetic understanding of the plight of the local Shell dealers unfairly targeted by the boycott. This will be done by working through existing summer teaching and information workshops on such issues as South Africa or the O.R. Tambo economy. Development of this approach can begin in 1986, but actual workshop participation must await the 1987 summer break.

III. STRATEGY

Crucial in the strategy will be the establishment of productive working relationships at all levels of the NEA organization -- with national officers, state officials, and local leaders. This must involve Shell U.S. officials, leading Shell dealers, and third-party advocates respected by the NEA. To soften AFT rhetoric, it will be necessary to build understanding and sympathy for the Shell dealers as having much in common with their union brethren. Local education support groups (e.g. PTAs) must be motivated to convince local teachers that the boycott represents a disservice to the community and a hardship for members of the community unfairly targeted.

IV. TACTICS

A. National Education Association

1. Evaluation of Position

The following activities will be undertaken to evaluate the current position of the NEA leadership and its members toward the boycott.

a. Review and analyze NEA public records and documents relating to the boycott position : determine level of leadership support and to identify individuals who are not completely supportive. Target these individuals for third party contact in order to soften NEA's position.

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b. Review and analyze official statements and general public comments by NEA leaders to determine the rationale for their position on boycott action and understanding of apartheid issue. Then prepare materials to be used to address that position for distribution to targeted state NEA leaders.

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Identification/development of contacts

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Based on the above review and analysis of the level of support and commitment, identify individuals at the NEA national leadership level who might support a change in the current position after considering accurate and convincing information.

Develop the most effective approach to presenting NEA officials with information that would change their position on the boycott. Development of information targeted to individual interest.

3.

Produce individualized information packages covering the apartheid issue and the boycott that reflect the expressed concerns of the targeted NEA officials. (See reference material in "Tools" section).

Third Party Contacts

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Identify third-party contacts at both the national and local levels, who might influence NEA officials to change their boycott position and work with them to do so.

Prepare briefing materials for third-party advocates on NEA position and the adverse reactions at the community level. Such advocacy groups will include:

1. National Association of Secondary School Principals, with which NEA already has close and continuing relations,

2. The National Congress of Parents and Teachers, a key organization with entry points at the national, state and local levels. Work with this group will be important if NEA makes a major effort to support the boycott.

3. The American Association of School Administrators, which has 54 state level affiliates and 18,006 members in positions directly influencing classroom teachers and their careers. The AASA conducts seminars,

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produces special reports, and holds an annual meeting, all of which offer possible platforms to present the Shell U.S. position. AASA support for Shell 0.8; would weaken the effect of NBA efforts.

Administrators are also important in policy decisions about what is taught in school systems. Thus it is imperative that the AASA has a clear understanding of the Shell U.S. position.

4. The National Association of State Boards of Education also has 54 state level affiliates and produces membership publications, special reports and issues papers. A counterpart group, the National School Board Association, also produces publications and special reports for local school board members. The strategy will ensure that, if the issue becomes important in the schools, the Shell U.S. position will be reflected in these publications.

B. American Federation Of Teachers

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Evaluation of Position

The following activities will be undertaken to evaluate the current position of AFT leadership.

a. Review and analyze AFT public records and documents relating to boycott position to determine level of leadership support.

3. Review and analyze official Statements and general public comments by AFT leaders to determine their rationale and depth of understanding of the issue.

Identification/Development of Contacts

a. Identify possible Shell advocates at the AFT leadership level. In the Nestle case, the head of the AFT supported boycott resolution initiatives and can be expected to favor a similar approach in the Shell case. Indeed, this could be one of the first unions to drop the Shell U.S. boycott. PI's relationship with Linda Chavez can be very effective in gaining direct contact with Albert Shanker.

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b. :Develop approaches to AFT advocates providing information addressing their individual concerns on apartheid and South Africa.

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Third Part1 Contacts

a. Identify third party contacts at all levels who might influence AFT officials and members to change or reverse support for the boycott.

Briefing materials outlining the Shell U.S. position and the negative consequences of the boycott on innocent Shell dealers must be developed for:

1. The National Congress of Parents and Teachers, both the national leadership and the state and local levels,

2. The American Association of School Board Members,

3. the National Association of State Boards of Education,

4. the National School Board Association.

b. AFT and NBA could be included in the breakthrough programs associated with the churches. This effort is being developed now.

C. Parochial And Private Schools

Eva-uation o: Positicn

The position on private and parochial school syszems will be evaluated based on the pei;:les of each sponsoring organization.

Coordination

Articulation of the Shell U.S. position will be carried out in coordination with church organizations; including:

a. The National Association of Boards of Education, which produces workshops and speci l reports with a Roman Catholic orientation and has counterparts in other denominations.

b. The National AsSociation of Catholic School Teachers, which maintains a speakers bureau and sponsors conferences and workshops for its members.

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D. Specialized And Related Groups

Several education-related or specialized constituencies will be important in developing avenues to reach teachers in schools located in predominantly Black communities, urban areas, or neighborhoods where Shell U.S. has a strong market presence.

1. Black Communities

The National Association of Black School Educators is a leading group seeking to upgrade the status of Black teachers. It has approximately 40 local affiliates which conduct workshops and special projects related to current teachers and their concerns with which Shell U.S. should interact.

2. Dealer Relationships

The Shell U.S. dealer association should be involved in contacts with teacher organizations, particularly at the community level. It would be possible, for example, to develop a school-based program under the auspices of the Future Business Leaders of America or a similar organization.

3. Alternative Educator Groups

Alternative groups such as the National Association of Professional Educators (NAPE) might be considered for effective advocacy of the Shell position. The NAPE has a membership of 50,096 and heavy representation in urban areas. The American Federation of School Administrators also could present an alternative. This group has 12,906 members, strong regional, state and local groups, and direct ties with the AFL-CIO.

4. Media Linkage

Specific materials for the media representatives will be developed to cover teacher issues at all levels.

THE NEWS MEDIA

I. ANALYSIS

The news media sets the public agenda through its intensive coverage of South Africa and will continue to do so. Coverage of the Shell U. S. boycott has been relatively light, thus far being lost in the sea of other South Africa stories.

II. OBJECTIVE

The prime objective is to prevent Shell 0.5. from becoming the focal point of media activity on South Africa and to minimize the credibility of the allegations of the anti-Shell forces by emphasizing post-apartheid planning by Shell 0.8. A second objective is to contribute to sound public policy formation rather than merely react to the policy agenda set by adversaries.

III. STRATEGY

To achieve the objectives we must develop a perception of openness with the media by addressing their concerns before viewpoints become settled, and shift the focus of debate from Shell to disinvestment and other issues.

IV. TACTICS

A. Preparation/Background Work

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1. Assess Situation from North American media point of view. A media specialist should be sent to South Africa to tour Shell South Africa facilities with an eye for seeing things as the North American media would see them. Detailed suggestions for improvements should be made. An outsider's of Jiew may help eliminate this look bad to the North American

2. Prepare Moore/Tra n Shell South Africa management to deal effectively with North American media. The media specialist should train and advise local management (especially Rietspruit) on how to deal with film crews and other media, using the Q & A book being developed by Houston, and should gather comments for improvement or clarifications of these points.

3. Collect material for use in North America

The media specialist should work with Shell South Africa management to gather material for:

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Kit of factual information about Shell South Africa. (H)

see individual media strategies below for further reference to these items.

b. Obtain photos to include in kit and to have to provide North American media when requested.

While there, develop a relationship with South Africa photographer to aid in obtaining photos to meet future requirements. (HG)

c. Develop plan/script for a videotape to be used with media and other programs. (B)

8. Media Analysis

Through continued computerized analysis of media coverage of the South African issue and the degree of focus given to Shell U.S. in the coverage, we will determine the priority targets for editorial board meetings. This will also allow the Action Group to monitor the movement in the press on the issue, the effectiveness of diffusion/deflection actions and to continually modify strategic media plans to address changing circumstances.

G : Action Group T 2 The Hague

H : Houston J : Johannesburg

L : London 8 :

Burson-Marsteller %

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C. Newseagers

1. Editorial Board meetings with 10 key newspapers based on their influence and concern for the issue will be held. (CHB) Participants in such meetings should be M. Seggerman or S. Ingersoll, a representative of the Action Group and the Shell South Africa representative.
 2. Comprehensive kit of factual information about Shell South Africa must be developed. (JHGLB)
 3. OE-ed articles by CEO on disinvestment arguments should be written. (GH)
 4. Letters to editor on disinvestment from key opinion leaders should also be written. (G) ///!lih
 5. Oo-ed articles by prominent economists and academics; e.g., Murray Weidenbaum, Prakash Sethi on the subject of disinvestment are necessary. (G)
 6. with other companies (possibly Mobil, GM, IBM) (sponsorship agreement not yet determined), a national Eress seminar could be sponsored on the issue of disinvestment. The seminar would have grominent speakers (to be determined by a prestigious, well-known conference chairman) from both sides and be open to the media. The seminar could be held at Georgetown University or Johns Hopkins in conjunction with its International School. (GH)
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disinvestment seminar and disseminate to 259 m
dailies. (GB)
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/. The Group would then publish a factual :eEort on
a:
8. A Shell South Africa expert and Action Group Media experts should arrange to visit with each newspaper bureau chief in Washington to provide background on the issue, Shell's attitudes and its policies. (G)
9. The Action Group will arrange informal meetings with eight of the most influential columnists (being researched) covering this issue with Shell South Africa to prevent becoming the subject of South Africa- related columns. (G)

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12.

The New York Times should be persuaded to convene a panel of economists to give the New York Times their impartial assessment of the economic impact of disinvestment on South African Blacks and Whites.

(BG)

Kits will be prepared containing favorable clippings based on other Shell U.S. activities (other parts of strategy) for use with reporters, editors and columnists. (B)

A centralized focal point for all inquiries about Shell and this issue will be maintained.(G)

D. Television

The television news strategy shall be 323 to seek exposure but to develop and maintain the capability to respond when necessary, to establish the appropriate background for understanding the issue and to use TV to diffuse and deflect the issue from Shell.

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Provide extensive media training to the Shell South Africa representatives and place him or her on appropriate TV talk shows as the issue tends to focus on Shell but not before. (GB)

Work closely with key producers of opinion leader-oriented TV programs, specifically McNeil-Lehrer. to promote debate on the disinvestment question, gg_

Minutes to develop program on the questions of how a North American corporation operates in a police state such as South Africa, Angola or Haiti. (GB)

Schedule events in Washington, 3.3., iuzih lg Congressional recess periods to attract C-span coverage and thereby reach opinion He adezs.

Prepare a 25-minute VTR on Shell South Africa operations, emphasizing the difficult choices faced by the company and the difficulty in "doing the right thing" within the boundaries of the laws of that country. Emphasis will be placed on the permanence of the Shell institution regardless of ownership. Target audience would be small city TV stations, schools, PTA groups and other places where Shell U.S. is already visibly under attack. (BJ)
Slides of Shell South Africa activities should be prepared for interleaving in presentations made before special interest groups in the United States and Europe by Shell South Africa or European

spokesmen. These slides in 35mm format would be made available to TV stations when it is determined Shell will inevitably be the subject of a story or program. (JBG)

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6; Hold a training seminar in South Africa for key managers of Shell South Africa affiliate's facilities, especially Reitspruit, in how they should deal with European and American film crews that want to shoot on premises. (JB)

7. Review all North American and European product commercials for sensitivity to the issue and to ensure that Shell's long-term viability in South Africa is assured.

8. Retrospective focus groups. This issue justifies an inexpensive but innovative procedure to carefully monitor the real impact of television news stories on viewers. Since Shell U.S. does not want to move in to actively pursue TV news until it is a known focus, a new use of a normally advanced technique would be applied to TV news coverage of the issue and especially Shell U.S. (GB)

E. Magazines

While the strategy with magazines will to a great extent parallel to that of newspapers, much greater use of the targeting potential of magazines will be used.

Naturally, certain specialized magazines will be treated in other aspects of the strategy.

1. National General News Magazines

a. Editorial anri Meetings saculd be held with Time, Newsweek, U.S.N. & N. R. and the New Reoublic to lay the g: undwork as in major daily newspapers above. (GB)

b. Make slides (above) available for color coverage. (B)

c. Establish liaison with Shell South Africa for photographers. (G)

2. Work closely with Fortune to encourage it to produce a major article on U.S. corporate disinvestment in South Africa and its implications, (Fuel debate).

(G through MM)

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(I)

3. Other business publications. Work with Business Week, Forbes, Today's Business and Editorial Research Reports, to promote discussion of disinvestment and "doing business in a police state."

4. Promote the movement of the South Africa issue in liberal-oriented magazines away from corporations
333 tctwre 5.5. government policy as decisive on the South Africa issue. (G)

Work closely with Chemical Week and Other Shell-related industry magazines to minimize the coverage of Shell in articles on S.A.

RADIO

Generally Shell U.S. should only react to radio, with the exception of debates, if the focus on Shell is achieved.

1. Response mechanism. Shell U.S. must have a swift means to respond to inquiries and allegations. (G)

2. Advertising. Same as television. (GB)

3. Actualities. Shell U.S. should have the capability to prepare and disseminate actualities, but only to use in the event of a major charge against Shell U.S. or other Shell affiliates. (H)

Other Media

Other media will be used in individual strategies as well as specifically in the media. The strategy for each of the media below is self-evident.

1. Newsletter. A Shell U.S. newsletter on this issue will be developed for use with myriad groups among which Shell is indeed publicly perceived as the appropriate target for the issue. (GH)

2. Pamphlets/brochures. Pamphlets and brochures will be prepared to present simply and succinctly the Shell U.S. position to those with an established interest, and used in several strategies. (GHB)

3. Q & A Book. It is imperative that a comprehensive Q & A book, covering every conceivable question or allegation about Shell be prepared for use with all

media and products developed for use in all strategies. This is a key document. (GHJTL)

Non-U.S. Media Plans

Plans should be developed in each targeted company outside North America to be put into action in the event that the media does begin to focus on Shell in connection with anti-apartheid efforts. Each plan would naturally differ because of the cultural differences and practices, but the plan should be modeled on the North American plan and have "trigger mechanisms" defined for putting aspects of the plan into action.

National Press Foundation

Shell U.S. should work with the National Press Foundation (NPF) to develop programs to help publications and individuals in South Africa that are trying to exercise free speech. The NPF is the foundation arm of the National Press Club and highly regarded by U.S. journalists.

1. Support a study on the state of the media in South Africa.
2. Develop suggestions for how to increase Black participation in the existing system.
3. Support programs to train Black journalists and editors either in South Africa or by means of internships in North America or Other countries.
4. Support Legal defense funds :0 aid media organizations and individuals that are prosecuted by the South African government because they have spoken out against apartheid.

CIVIL RIGHTS GROUPS

I. ANALYSIS

The anti-apartheid movement has brought new life to the civil rights movement in the United States. It has evoked nostalgia of the struggles and successes of the sixties and seventies, and also has brought civil rights coalitions of the past together again. However, the anti-apartheid movement is also significantly different from the past. It is a movement by and for the major Black leaders and Whites with media appeal. It does not have significant grassroots appeal.

Some U.S. civil rights groups recognize that the South African environment does not have the benefit of a strong democratic tradition which supported the civil rights movement in this country. But nearly all civil rights groups see a correlation between apartheid and past legal segregation in this country.

The civil rights movement still has close ties to the churches, particularly to Black churches. Indeed, the ties to the Black church are much stronger than those linking groups to the National Council of Churches or to the World Council of Churches.

The four key groups to be included in the Civil Rights Strategy are: the NAACP, the Southern Christian Leadership Conference (SCLC), Operation PUSH, and the Rainbow Coalition. NAACP is experiencing financial difficulty and is moving to Timore. Benjamin Hooks, Executive Director, is under some

pressure to instill new life into the organization.

The SCLC is to be centered around one person, Joseph LCWEIV,

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Operation PUSH is now headed by Rev. Howard Tazlor, a Slack-tyman, and a faculty member at Garrett Evangelical Seminar in Evanston, Third. Rev. Jesse Jackson gave up the PCS: presidency to head the Rainbow coalition and to prepare for another presidential campaign. Most recently, Operation PUSH instituted a boycott of the local CBS station in Chicago for demoting a Black news anchorman. This attracted the attention of CBS in New York and the elevation of a Black person to a top administrative position at CBS in Chicago.

II. OBJECTIVE

The primary objective of the strategy is to minimize the involvement of the major civil rights groups and the "grassroots" in the Shell U.S. boycott. It may be impossible to pull them out of the boycott but it will be possible to make them relatively inactive.

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III. STRATEGY

The civil rights and church strategies must be closely coordinated. Civil rights groups are responsive to the leadership of Bishop Tutu and Rev. Boesak who have ties to Black churches in the O.S. Thus, efforts made with Bishop Walker, Rev. Lorenzo Shephard, President of Progressive Baptists (Biach), Andrew Young, etc., directly influence civil rights groups (See Church Strategy).

Second, civil rights groups are less radical and ideological and are more concerned with the future and development of a new society. Thus, a post-apartheid strategy fits well with the historic commitment of the Ufmbiva to the next steps.

IV. TACTICS

A. Leadership Meetings

Establish one-on-one meetings with Randall Robinson through either Bishop John Walker, Gil Caldwell or Joe Louis Barrow. While Robinson needs this boycott to raise funds and visibility for TransAfrica, Shell U.S. cannot be seen as ignoring him or his organization. Thus conversations, while not likely to have significant short-term effect, should be formally undertaken, and will demonstrate Shell U.S. openness.

B. Comparative Document

The Action Group should prepare a complete analysis of the requirements of the Sullivan Principles, the EEC Code and the actual performance of Shell South Africa for use with civil rights groups. This document should set forth each requirement and Shell's achievements in parallel fashion for ease of comparison. This will not only provide a valuable tool in working with those who use the Sullivan Principles as the appropriate benchmark, but will also flag areas of possible vulnerability for Shell South Africa.

C. Sullivan Audit

Shell South Africa should be encouraged to review its policies and practices in terms of the Sullivan principles and try to determine, if possible, what "grade" it would receive if it were audited for compliance with the same measurement. If appropriate, Shell South Africa could contract with, for example, Arthur 3. Little to do a private audit of its South Africa activities as though it were a Sullivan

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signatory. A good grade on this audit can be publicly announced with some fanfare, thus making it much more difficult for individual organizations to justify singling Shell U.S. out for a boycott. The establishment of a Sullivan audit grade allows Shell South Africa's policies to be compared with 0.5. companies', and it will become clear that singling out the company here (Shell 0.5.) is inherently unfair. It does not matter whether the Sullivan guidelines are correct or whether the audit program is perceived at some levels to be flawed. They are the only standing criteria which the average person knows anything about and the yardstick by which he/her is forced to judge companies.

The inherent inequity in targeting Shell 0.3. when Shell South Africa has a better record than many American companies will not deter the activists from boycotting the company, but is a powerful argument when dealing with the average man on the street and with civil rights organizations.

The BBC Code

The European Parliament has already challenged the EEC Code as being insufficiently strong. The Royal Dutch Shell Group could take the lead in urging that the 82 guidelines for doing business in South Africa be strengthened. Bishop John Walker, 3. Armstrong with Dr. Leon Sullivan could chair a working group of European corporate leaders including Royal Dutch Shell participants in an effort to draft a proposed, revised EEC Code with Stranger audit or reporting requirements than currently exist in the SEC guidelines.

Bishop Walker

The meeting with Bishop Walker, described in detail in the church strategy, will include civil rights leaders, probably Randall Robinson, Jean Sindab (Washington office on Africa), and possibly Lowery of the SCLC, Tutu and Boesak.

Congressional Black Caucus

The Congressional Black Caucus (CBC) is an important touch point for Black issues on Capital Hill. Its members understand the necessity of negotiation and compromise and thus could become involved in post-apartheid formulation. Shell 0.5. already has a good relationship with Congressman Mickey Leland, a member of the CBC, who could be tapped to get post-apartheid issues on the CBC agenda.

H.
Training
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1J. Armstrong and G. Caldwell would, at the appropriate time, meet with Joseph Lowery of SCLC to persuade him to participate in the formation of a training program involving predominantly Black universities and colleges in Atlanta. (see Breakthrough Actions).

Coretta Scott King

J. Armstrong will meet with Ms. Coretta Scott King to establish with her a formal system of correspondence to keep her fully informed of Shell U.S. efforts, especially those based on the post-apartheid issues, with a view toward gradually dampening her enthusiasm for the boycott. Both Bishop J. Walker and G. Caldwell have access to Ms. King and will assist in this effort.

Leadership Liaison

Shell U.S. should establish regular relations with several Black leaders, working closely with Caldwell and the Action Group. Such leaders should include:

Dr. Benjamin Hooks, NAACP

Jennifer Davis, American Committee on Africa

Jean Sindiga, Washington Office on Africa

Rev. Jesse Jackson, National Rainbow Coalition

Ralph G. Nease, Leadership Conference on Civil Rights

Frank Chapman, National Alliance against Racism and Political Oppression

Roger Wilkins, Jr., TransAfrica

and

Committee, Institute for Policy Studies

Mary Frances Berry, U.S. Civil Rights Commission

Walter Fauntroy, D.C. Representative in Congress

Parren Mitchell, U.S. Representative from Maryland

Congressman Gray of the Congressional Black Caucus

John Jacobs, National Urban League

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Conclusion:

Our strategy for the churches has direct implications for civil rights Groups. G. Caldwell knows Jean Sindab and Joseph Lowery personally and has been arrested at the South African Embassy. Additionally G. Caldwell has NAACP contacts, knows Jesse Jackson and, in fact, was arrested with him in a boycott of A&P grocers. Further, Joe Louis-Barrow, Jr. also has contacts with many of these civil rights leaders. A direct outreach effort utilizing Caldwell and Barrow to establish one-on-one meetings with civil rights leaders, frequently in conjunction with Black church leaders will endeavor to establish credibility for Shell U.S. and minimize the involvement of these groups.

PROFESSIONAL ORGANIZATIONS STRATEGY

I. ANALYSIS

Professional organizations represent a major communications channel and potential resource for Shell U.S. through which it can articulate its position and encourage a broadening of the debate on disinvestment and a post-apartheid South Africa. These groups have good membership communication facilities, a high level of believability with the professional community, and offer direct access to leaders of the organizations on the national, state and community levels. In addition, many organizations have financial resources which might be available for a coordinated effort to help Black South Africans prepare for post-apartheid leadership roles.

II. OBJECTIVE

The primary objective of this component is to inhibit professional organizations from endorsing the boycott, and where possible, convince them to encourage membership to support local dealers.

In addition, Shell U.S. should seek to enlist their aid in programs preparing Black South Africans for post-apartheid leadership roles.

III. STRATEGY

Shell U.S. has a wide variety of connections into professional associations and organizations in North America. Organizationally, the Washington office of Shell U.S. is particularly well-situated and structured to continue to enhance the company's relationships with these professional organizations, especially those headquartered in Washington. Shell 3. already maintains c:cg: ams to cultivate various professional organizations, and these programs should be expanded. rly, Shell itself, not third-party representatives, should be directly in touch with these professional organizations. Among the tasks which could be carried out are:

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- 1. Providing professional organizations with Shell's position on apartheid and the positive steps it is taking to prepare Black South Africans for post-apartheid leadership.

IV.

Encouraging these organizations to undertake similar activities or to work with a coordination committee to provide resources toward these programs.

Explaining the boycott's harmful effect on Shell dealers and asking organizations to encourage their membership to think carefully before participating in a boycott.

TACTICS

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Resource Clearinghouse

Among the optional tactics which might be employed to carry out this strategy is the development of a non-profit clearinghouse for the coordination of resources (some of which would come from professional organizations) to aid Black South Africans. This clearinghouse would include:

1. Groups that have a high percentage of members who do business in or with South Africa, (e.g. National Association of Chemical Distributors, Industrial Diamond Association of America, etc.)
2. Groups that are known to have liberal political agendas and activist memberships such as women's and minority organizations (e.g. American Association of University Women, National Association of Black Women Entrepreneurs, etc.)

Internal Shell Clearinghouse

Identify Shell employees who are members of any targeted professional organization. It will be important to include these individuals in all communication with and influence these groups, to the advantage of employee contacts and credibility.

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If it is determined that the anti-apartheid movement is focusing on Shell U.S., it will be necessary to communicate with the leadership of target professional organizations to:

1. Communicate the Shell U.S. position and the actions it has taken,
2. Urge them to take similar actions to make the best use of the strengths of their group,
3. Emphasize the damage that a boycott would do to the individual Shell dealer and encourage them to press for non-participation by their members.

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EMPLOYEE STRATEGY

Shell U.S. has excellent personnel information programs in place dealing with the boycott and South Africa issue. Recognizing the extent and quality of the company's current programs, our main recommendation is that those programs dealing with information and policy on apartheid be coordinated and integrated into this strategy.

I. ANALYSIS

The 3s,aaz employees of Shell U.S. can be one of the company's most effective communication tools.

Moreover, the Company's large pool of loyal retirees also represents a valuable resource in communities around the country which can be mobilized to represent Shell's position, especially in target boycott areas.

Furthermore, Shell U.S. also has available a reservoir of contracted employees (e.g., accountants, lawyers, consultants, etc.) who can also be effective communication outlets and who have a vested interest in Shell's corporate well-being.

Primary implementation responsibility for the employee and retiree strategy should rest with Shell U.S. Human Resources Management, with assistance by the Advisory Group as needed.

II. OBJECTIVE

The prime objective of this effort is to turn the Shell U.S. network of employees into "Shell Ambassadors" who will defend the company on the grassroots level in their churches, local business and women's clubs, unions and other local organizations.

III. STRATEGY

Loyalty and commitment of Shell employees and retirees will be fundamental in transforming them into Shell Ambassadors. Thus, it is essential that they are kept informed and aware of the South African issue and the company's position.

TACTICS

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1. Immediate mailing to employees, retirees and contract employees assuring them of the Shell's strong opposition to apartheid, faith in the post-apartheid era and commitment to the establishment of a democratic South Africa.
2. Development and mailing of an revised Fact Sheet for all three groups. The Fact Sheet would be simple and succinct -- clearly communicating the issues and the Shell position. It should be made available to employees to post or distribute in their churches, local organizations, etc. It should clearly delineate who to contact for additional information. Mailings to full-time, contracted employees and retirees on a full-time, timely basis, as needed, to communicate the status of boycott and issue.

B. Publications

1. Conduct a review of Shell U.S. in-house publications to determine if they are the most effective means of communicating with employees. Are they read? Do they contain useful information? If so, the Shell U.S. position should be addressed with each issue of the publications.

Every formal communication to employees should include a status report on the boycott and an update of the company's effort. A special "Chairman's Column" or "Boycott Task Force Column" could be included to let the readers know where to turn for this type of information.

If current materials are determined to be inadequate, Shell U.S. should develop a newsletter for employees that would deal specifically with this issue. This can be done quite cost effectively with a minimum amount of time and can honestly and factually describe the controversy.

C. Emgloxee Hotline

If the boycott activity increases rapidly in the next six months, as expected, a 24-hour Hotline for employees could be established. This would allow employees and retirees to submit information on local boycott activities to Shell 0.5. and would give employees access

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to information on a round-the-clock basis. Such a Hotline would keep Shell U.S. managers and the Action Group aware of and responsive to emerging problems and developing networks.

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Plant Management

During the next national or regional meeting, plant managers should be briefed on the South Africa issue and instructed on methods for dealing with inquiries from workers and the community. Plant managers should be trained to be spokespersons at the local level. They must know what to do in the event of a plant protest, how to calm a worried worker and where to direct people for additional information. Regular meetings should be held by management with employees to brief them on developments. A careful sensitivity toward critics of conscience should be developed. Confrontations at any level must be avoided; public concerns and queries must be handled with care and common sense.

Employees as Spokespersons

1. Employees should be encouraged to speak out for the company in their community and must be assured that Shell 0.8. will provide information and materials to support their efforts.

2. Similarly, senior and middle management should be encouraged to work, when possible, with the employee groups.

International Public Affairs Meeting

London or The Hague should arrange a meeting of the Key public affairs persons from each Shell affiliate targeted for attack on the South African issue. At this meeting the overall strategy would be discussed and individual suggestions analyzed. It is critical that all parts of the company speak with the same voice and that any positive effort made in one nation be duplicated or exploited in others.

B.

C.

UN Monitoring

To date, Shell U.S. has not found it necessary to develop an in-depth international issues system or a system keyed specifically to the United Nations. This is understandable for a company whose business is largely focused within the United States. Within the Shell U.S. organization, Scallop is the entity with the most developed UN monitoring capability, but this has not yet been integrated into Shell U.S. or its Washington office.

Therefore, the extensive monitoring resources of PI, through the Action Groups and through existing EW/RAM systems, will be focused on continued monitoring of the UN, its member agencies, and its "observer" status organizations to track the general international organization climate and to provide early warning and analysis regarding potentially damaging resolutions or programs.

When and as desirable, meetings with top leaders of UN bodies will also be arranged to ensure that the Shell position and company initiatives are clearly and forcibly articulate.

Eurogean Economic COMiSSiOD

Close coordination with industry organizations will be encouraged to convince the EEC to remain opposed to sanctions, and to keep the EEC abreast of Shell Group efforts to contribute to post-apartheid development.

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GRASSROOTS STRATEGY

The grassroots programs of Shell U.S. appear to be quite well developed, both in concept and in application. They should be continued forcefully.

It is important that these community-based programs keep the objectives of the overall strategy very much in mind as they are implemented on the local level. Articles in employee and management newsletters used internally should not discuss the strategy, but should underscore the basic policies of the company so that these are reflected in the local community relations programs. The importance of communication with local groups should also be highlighted in the internal documents.

If the South Africa activist focus on Shell 0.5. becomes clear and distinct and the visibility of the boycott becomes high enough, Shell U.S. should consider including informational leaflets in its mailings to credit card holders.

Recognizing the strong and significant Shell U.S. grassroots network, PI, through its church, media, and community programs, may be able to supplement these efforts in geographic areas in which the Shell U.S. presence is weak. Via the Action Group and within the strategy, PI will mobilize its networks as necessary in this regard.

POLITICAL ACTION/GOVERNMENT RELATIONS

I. ANALYSIS

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The 0.8. political situation regarding South Africa could have a significant impact on both Shell South Africa and on Shell 0.5.

On the national level the Administration is committed to "constructive engagement" and to being a positive force for change in South Africa. This same policy is likely to become a major campaign issue in 1986, with the Democratic Party being harshly critical of the Administration's policy. On the state level, 27 states are now considering restrictive South African legislation, and the number is likely to increase.

II. OBJECTIVE

The prime objective of the political strategy is to have Shell U.S. and the Royal Dutch Shell Group perceived by civil rights leaders and key politicians as a caring, concerned corporation working for change in South Africa.

III. STRATEGY

To achieve this objective it will be essential to work closely with the President's South Africa Commission and with civil rights leaders, key Administration leaders and the democratic opposition in conveying the Shell U.S. commitment to a post-apartheid South Africa.

It will also be essential to ensure that the boycott is not endorsed by influential politicians and that Shell South Africa is not singled out as the evil fueler of the apartheid regime. (See Annex 12 3f the Intelligence Report for analysis of Shell South Africa's energy role in South Africa).

Fundamental to the strategy is close coordination with previously established programs and continued monitoring of state legislative activity. The Shell U.S. Washington office should have prime responsibility for these affairs, keeping the Action Group informed of its activities.

IV. TACTICS

A. Administration Programs

Shell U.S. officials will meet with high level Administration officials to express the company's concern about apartheid policies, and to volunteer Shell U.S.

assistance in working with ongoing projects in South Africa with such organizations as AID, the African-American Institute, the National Endowment for Democracy, the International Committee of the Red Cross and the U.S. Department of Commerce.)Shell U.S. may be able to provide the Administration with insights as to the effectiveness of certain programs. Additionally, Shell U.S. should cultivate allies in the Administration who will counsel and support its initiatives. Many of these actions are ongoing or can easily be initiated by Shell-Washington.

Democratic Party

The Action Group will closely monitor actions of the Democratic party which may lend any credence to the Shell U.S. boycott. Elements of this tactic might include:

1. A mailing and Fact Sheet to all congresspersons presenting the Shell U.S. position sensibly, logically and unemotionally.
2. Quiet meetings with conservative leaders to inform them of the Shell U.S. policy.
3. Meeting with key Democratic leaders, especially Senator Edward Kennedy.

Congressional Record

Positive materials, such as the Fact Sheet and other "Tools", will be submitted to the Congressional Record. These reprints will lend an air of authority to Shell U.S. materials.

Think Tanks

The strategy will promote and support the efforts of conservative Think Tanks to analyze and produce papers on South Africa and related issues of importance to Shell U.S. These Think Tanks -- Heritage Foundation, American Enterprise Institute, Ethics and Public Policy Center, the Stanford Research Institute -- have a wealth of information on and contacts in all elements of national and international government which could be helpful to Shell U.S. efforts.

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State ngislation

Continue already established activities monitoring states' consideration of restrictive South African legislation, especially legislation which would restrict states from entering into contractual agreements with companies that do business in South Africa. Where the Shell Washington office requires additional geographic coverage to accomplish this task, the PI network will be activated.

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BREAKTHROUGH ELEMENTS

I. INTRODUCTION

At various stages within this strategy document, elements set forth might be characterized as "breakthrough" elements. A breakthrough is an opportunity that is exploited to the fullest, with all necessary resources moved from other areas of activity to maximize the success of the breakthrough. Such activities would be undertaken only if events warrant and the likelihood of success of the project is very high. Breakthroughs help Shell take control of its relationship with a given segment of the society.

Not all of the breakthrough elements suggested in the strategies will necessarily be implemented. Others may present themselves without notice, and there will be a need to recognize and exploit them.

II. SPECIFIC ELEMENTS

Six of the most significant breakthrough elements mentioned in the strategy are 1) the Post-Apartheid Training Program, which includes the Georgia Tech program mentioned in the Church 2) the formation of the Institute for the Study of j % Post-Apartheid problems-at Notre Dame, discussed in both the Church and University strategies; 3) the Walker Institute, discussed in the Church Strategy; 4) the "Ombudsman" appointment, described in the PVC Strategy; 5) the National Press Foundation efforts, described in the Media Strategy; and 6) the Public Advisory Council element, described in the Concept Strategy. strategy;

The

following is a more detailed discussion of the potential of each of

A.

these elements.

Training

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The Problem

One of the most politically effective and legitimate reasons for a continued multinational business presence in South Africa is the need to train Black South Africans to create wealth and jobs, and to participate at the highest levels of government in a multiracial, democratic society.

To be economically productive and democratic, the development process requires public and private institutions, as well as large and small units of economic production.

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Shell South Africa, like other companies, trains Black South Africans both in technical skills and in the managerial skills necessary for succession to executive positions in large private companies. However, management positions in large companies will be only a small portion of the total human resource needs in post-apartheid South Africa. Black South Africans will be placed in high-level positions with political, administrative, technical and managerial portfolios of responsibility, and will be expected to carry out those responsibilities immediately and well. Currently, the effort to train Black South Africans for such positions, public or private, are limited, uncoordinated, and will meet only a small percentage of future needs for trained political and business leaders among Blacks. The post-apartheid expectations for Black leaders, administrators and technicians may lead to disappointment and conflict rather than to stability and economic productivity.

Preparing Blacks in South Africa to assume leadership and management roles in the public and private sectors of post-apartheid South Africa offers the best Opportunity for industry investors in that country to participate actively and ' -constructively in the development of government, business, and economic leadership and management for that country.

Therefore, in addition to its training programs for Black South Africans within its corporate structure, the Shell Company could create or contribute to programs that recruit talented young Blacks for training in public administration and management in institutions located in the United States and Europe.

The Breakthrough Program: Georgia Tech

As noted in the church strategy, Atlanta can be expected to be a major focal point for anti-apartheid, pro-boycott activity. It is the home base of Coretta Scott King, Joseph Lowery (SCLC), and Hosea Williams. Its mayor, Andrew Young, is an ordained UCC clergyman and a former staff member of both the NCC and the UCC. The assist of such leaders will be crucial in transforming business training initiatives for post-apartheid into a well-planned, well-targeted program.

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One clear problem with such a training program emerges, however, given the many Black political factions in South Africa and given that most young Black leaders are affiliated with at least one faction. How can one select participants in such training programs without automatically having Shell appear to be taking sides as to the future shape of South African political power?

To respond to this problem, Shell U.S., either alone or with other companies, might create a Blue Ribbon committee of eminent persons such as retired . jurists, ambassadors, prominent academicians and clerics to plan the training program and to serve as a screening committee for applicants. Mayor Young could chair the committee and help to assist in the selection of its members. Thus, selection could be seen as outside of Shell's control and determined by an independent, unaffiliated body.

A second problem with training programs is also relevant. Unless the post-apartheid period approaches with some alacrity, companies in the program may find the training program imprisoned in the classic Ted Gurr J-curve of dissatisfaction. Training of any type will raise expectations. When opportunities do not keep up with expectations, frustration results. Frustration, over time, leads to growing dissatisfaction with established systems, and thus feeds violence against those systems. In short, training per se could make things in South Africa worse rather than better if certain precautions are not taken.

Personnel trained in technical skills may prove relatively easy to place in corporate settings. This may not be the case for those trained to be general public policy administrators or political leaders. Meaningful roles for the latter categories of young Black leaders may prove difficult to identify and to sustain until history catches up with apartheid. Again, token positions may only feed frustration.

One solution might be for the above Blue Ribbon Committee, through multinational corporations with extensive South Africa operations, to assist the trained personnel in finding jobs in corporate management positions or in community organizations and projects until they can be employed in the government positions for which they have been prepared. '

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'Institute for the Study of Post-Apartheid Problems

1.

The Problem

As noted throughout this document, there is both strategic and objective merit in focusing the energies of business, academia, churches and activists on the development of the economic, political and social infrastructure in post-apartheid South Africa.

To date, however, little coordinated examination of the problems and prerequisites of post-apartheid scenarios has been undertaken. This presents a major opportunity for Shell.

A Notre Dame Institution

As noted in both the church and university strategies, Notre Dame represents a unique opportunity for creating an institution for the study of post-apartheid problems. On the one hand, its senior administrators notably Father Theodore Hesburgh, are close to and respected by religious leadership in the U.S. and Europe. On the other, Father Oliver Williams and Lee Tavis of Notre Dame's School of Business Administration have close ties to the South African business community and are completing a book on South African business. Hesburgh, Williams, Tavis and others at Notre Dame could be significant participants in dealing with the present South African reality and in envisioning E: are prospects. In each, some of PI's principals are involved in dialogue dealing with South Africa at Notre Dame.

Post-Apartheid Coordination

1.

The Problem

In the last year, there has been a tremendous amount of discussion, and a number of significant initiatives, about business and other private efforts to aid the Black South African majority. Many of these efforts have addressed crisis relief; some have focused on social programs for the poor; others have set up over-arching foundations to address a variety of social and economic needs.

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All of this assistance and concern has, to date, been largely uncoordinated. This is of major concern to South African church leaders and to Bishop Walker, because isolated efforts can more easily be ignored by the current South African government than could a coordinated, well-publicized effort by a critical mass of business and private leaders.

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Shell may have a very immediate opportunity to participate in such an effort. As described in the church strategy, Bishop Walker wants to bring together a number of CEO's of major U.S. companies doing business there with significant church and civil rights leaders to plan an agenda to present to Tutu, Boesak and other significant South African leaders as a major coordinated, well-publicized effort that the South African government could not ignore and which would provide a new focus for activist and business interests. Shell's participation in such an effort would demonstrate its commitment to post-apartheid South Africa and thus counter any danger of leading church participation in the Shell U.S. boycott.

Unions

1.

The Problem

The Shell U.S. boycott has received its major support from the union sector. Indeed, nearly all boycott material is printed by the AEL-CIO.

However, any approach by Shell 0.5. to organized labor might be interpreted as "negotiations" between Shell and labor over the boycott. This must be avoided. At the same time, however, it is important for Shell U.S. to demonstrate a willingness to exchange views and perspectives with labor, so as not to be portrayed as defensive and arrogant.

Ombudsman

The Union strategy suggests the appointment of a senior, respected, well-known public figure as an ombudsman between Shell and organized labor; The announcement of such a move could halt the momentum of union support for the boycott by demonstrating a willingness to seek areas of common interest.

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National Press FOUndation

The Problem F

Media in South Africa have long been censored, with serious limits placed on free speech. Yet, in a post-apartheid democratic society, a strong, skilled, independent press will be a crucial social and economic element.

Within South Africa, and in the current situation, it would be extremely difficult to develop local programs to help publications and individuals who are trying to exercise free speech.

A 0.5. Board Foundation

To respond to the problem, Shell U.S. could, through the National Press Foundation,

- a. Support a study of the state of the media in South Africa.
- b. Develop suggestions for how to increase Black participation in the existing system.
- c. Support programs to train Black journalists and editors either in South Africa or by means of internships in North America or other countries.
- d. Support legal defense funds to aid media organizations and individuals that are prosecuted by the South African government because they have spoken out against apartheid.

Shell U.S. Policy

1.

The Problem

By initiating a boycott against Shell 0.5. and widely distributing misleading information on Shell South Africa operations, activists have succeeded in reducing the credibility of Shell U.S. among public policy leaders and in overall public opinion. To remedy this situation and regain a forum for its programs and positions, Shell must demonstrate its willingness to be open and, at the same time, contrast its openness with the approval of its critics.

Development of a "Public" Advisory Board

An Advisory Board of eminent, prestigious persons would be organized to assist Shell 0.5. in responding to public accusations about apartheid and in seizing the public high ground by developing a positive Shell policy on operations in South Africa. Each of these efforts have a very high visibility, take a leadership position in directly addressing problems, are virtually unassailable in their effect, and demonstrate a sincere dedication to solving the problems the South African majority must address. '

As these are implemented they enable Shell 0.8. to "get ahead of the power curve," in that control of events passes from the activists to the company and the public perception of the company is significantly improved.

All of these "breakthrough" elements can be included in some enlightened initiatives that are now emerging among the most prominent and respected Black leadership in the 0.8. and South Africa. PI and the sponsors of the above initiatives can seek other supporters and sponsors for the breakthrough elements suggested among other corporations and institutions that have a high interest in South Africa. Identifying early with some of these carefully conceived initiatives should give Shell credibility and visibility among the Key movers in the anti-apartheid movement in the U.S. and abroad. The impact of these early strategic moves by Shell on the boycott's momentum should be highly beneficial to the company.

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TOOLS TO BE DEVELOPED FOR STRATEGY IMPLEMENTATION

Throughout the strategy it is assumed that the Royal Dutch Shell Group will communicate effectively with its target publics. To do this various tools have to be devised. On the surface, there may appear to be some duplication among tools, but in reality each has its own language for communicating effectively with specialized audiences.

A. Print Materials

1. Comparative Document

Building on the preliminary comparative analysis contained in Annex 10 of the Intelligence section of this document, the Action Group should prepare a complete analysis of the requirements of the Sullivan Principles, the EEC Code and the actual performance of Shell's affiliate in South Africa. This document should set forth each requirement and Shell South Africa's performance in parallel fashion for ease of comparison. Not only will this provide a valuable tool in working with those who use the Sullivan Principles as the appropriate benchmark, it will also flag areas of possible vulnerability for Shell South Africa.

2. Q & A Book

A comprehensive Q&A book must be prepared with the cooperation of Shell South Africa and the Royal Dutch Shell Group. This Q&A book should be in the best professional tradition and brought up to date on a weekly basis. A limited distribution of this book to all Shell spokespersons, especially top Shell U.S. executives, must be coordinated closely

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by Shell U.S.

3. Shell South Africa Fact Sheet

A specific analysis of the activities of Shell South Africa will be clearly set forth in simple terms. It must address labor practices and general management policies toward workers and their training, housing and professional development.

4. Brochure on the issue/boycott with key South African Information

This brochure must be simple, short and graphically attractive, yet inexpensive and produced in great quantity. It will be used with employees and given

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to dealers to use with customers who raise the boycott issue on South Africa, it may at some point be necessary to develop a specialized version of this brochure for use with credit card holders.

Shell South Africa: A Positive Force for Change

This will be a very positive publication in annual report dimensions. It will articulate the positive steps Shell South Africa is taking to promote change in South Africa and to participate in the development of a post-apartheid society. This positive, detailed publication will be used with church leaders, university faculty, key editors and civil rights organizations.

Shell/Labor

A publication must set forth in quite simple terms the labor policies of Shell South Africa, Shell companies in the U.S. and Canada, and Royal Dutch Shell globally. It should emphasize blacks, women, and minorities' relationships with unions, and will be used with labor unions, reporters and others with organized labor constituencies.

Aide Memoires

Aide Memoires of meetings, agreements and policy programs will be prepared for use with key targeted groups. These are necessary to create a record, show progress, respond to critics, explain events and relationships with critic groups to the media. They also become a series of fact sheets for use in any of the action strategies.

Shell and South Africa

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-This uncomplicated brochure will set forth the issue and the facts in very simple terms. It will be used to respond to letters from school children and in elementary and secondary classroom discussions in response to NBA efforts. Educators will be closely involved in its preparation, and it will be used only when called for.

Dealer Posters

One of the more effective communication tools will be the development of a poster for service stations emphasizing Shell's efforts in South Africa and noting that buying Shell products contributes to a just, democratic South Africa. .

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Video and audio/visual products

VCR of Shell South Africa operations with emphasis on employees, including an interview with some union members and leaders, comparable white and black housing at Reitspruit, other operations, including refining, detailing training programs and opportunities for black advancement. Included would be excerpts of an actual speech being given by John Wilson challenging apartheid. Thirty minutes in duration, prepared entirely in South Africa for use only in North America, this VCR would be available to church and other critics studying the issue or asking a spokesperson to cover South Africa (3% copies minimum).

Modular slide Presentation A slide presentation should be prepared which will tell Shell South Africa's story and emphasizing its commitment to a post-apartheid society. This presentation will expand to include discussion of breakthrough efforts as they are put in place. Individual modules will emphasize labor or church activities or other individual components best suited to each individual audience. All will be built around a basic script with many unchanging visuals. This presentation must be set up in various forms; i.e., a wholly self-contained (with audio) 35 mm package that is general in nature, which can be used by any Shell U.S. spokesperson or even employee or station owner with a general group (e.g. dealer with Rotary) so that the story can be told with minimum information from the presenter. It would also be used with high school and college debate teams and should be accompanied by the above brochure. The presentation in modular form should be accompanied by a modular script so that a more specialized 35 mm version can be given by a medium level spokesman (e.g. at a high school or local union meeting). It should also be prepared in modular form in overhead positives so that higher level spokespersons have strong presentation tools to use with senior level groups or gatherings.

Shell U.S. VCR. This should be a short VCR of the Shell U.S. CEO giving a ten-minute presentation on the boycott issue and stating the Shell U.S. attitude toward apartheid. This will be used by spokespersons, in conjunction with other presentations, to those selected audiences which need to see CEO commitment to believe.

DEALER'S ASSOCIATION STRATEGY

The 11,600 independent service station owners who retail Shell U.S. products are the immediate target of boycott activities but obviously have no role in the policy making or the policy implementation of the Royal Dutch Shell Company. They 3 therefore constitute a sizeable force of people at risk with a stake in the issue.

Shell U.S. has an in-depth program of dealer relations. It should continue this communications policy and ensure that those dealers receive all supportive materials and fact sheets on the South Africa issue. Shell U.S. successes to date on the boycott issue have involved its dealer relations and network. Dealers thus should be supported in every way possible with material and information.

It might also be possible to show videotapes which explain the Shell U.S. position at the Dealer's Association meetings to ensure as thorough an understanding of the issue as possible. The work being done with the Dealers by Shell U.S. and Burson-Marsteller should be continued.

It is essential to have the Dealers understand this issue, for they will, in most instances, be the individuals confronted directly by the public and by those seeking to take action against the company. They also constitute one of the most immediate sources of information on the effects of boycott actions on sales. All efforts with the Dealers should be integrated in the overall strategy.

The Dealer's Association may want, at its own initiative, to contact one of the three most prestigious mediation centers and ask them to intervene with the boycotting organizations. Such an effort would focus attention on who is most hurt by the boycott and would raise peripheral fairness issues currently not available to the company in a credible way. Any refusal to participate by boycotting groups would harm their public image, especially with the churches.

STRUCTURE AND ORGANIZATION

-I. THE PROBLEM

The Shell U.S. strategy addresses a very complex issue involving a diverse array of "public interest" groups and institutions. The structure that is established for implementing that strategy must be capable not only of carrying out the myriad interrelated tasks envisioned but also of coordinating with the various components of the Royal Dutch/Shell Group which must play important roles in the strategy.

As has been made clear throughout this document, although the focus of the boycott is North America, for a wide variety of reasons the containment and resolution of the boycott must involve the Royal Dutch Shell Group. In turn, the orchestration of this involvement requires the utmost coordination.

The rationale for affiliate involvement in the proposed strategy is based on the nature of the activist goals, the perceptions of Shell U.S. that activists have sparked and the nature of the activists themselves.

The general public, news media, and, perhaps most importantly, the activists themselves view (or have chosen to portray) "Shell U.S." as a worldwide company in which any corporate affiliate (e.g., Shell U.S.) can and should be held accountable for the overall company and any of its parts (e.g., Shell South Africa).

As a multinational company that accords its affiliates operational autonomy, the Royal Dutch Shell Group, understandably, might prefer that its affiliates determine the need and appropriate shape of any South Africa initiative on a country-by-country basis. Such a course would reflect the overall Shell culture, as well as its policy of autonomy for national affiliates.

But reality often refuses to conform to corporate policy. In fact, such a policy does not and will not be consistent with how the critics depict the company. Nor does it reflect the reality of how the movements confronting Shell U.S. are organized worldwide.

Those who are leading the boycott have portrayed "Shell" as one company. They are convinced that pressures brought against Shell U.S. will influence the Royal Dutch Shell Group in Europe to require Shell South Africa to cease or to sharply modify its operations.

Mottover, Shell's critics -- including those leading the boycott in North America -- think globally, have access to an increasingly effective international network that monitors the local practices of multinational companies, exchange intelligence and advise each other on tactics. Any incident involving Shell South Africa, for example, quickly becomes known to Shell critics in the United States and Europe.

i II. COORDINATING STRUCTURE

A. Action Group for the Shell South Africa Initiative

Given the need to combine strategy implementation with Shell coordination, PI recommends the creation of a central operation to be called the Action Group for the Shell South Africa Initiative.

This Group will be composed primarily of a team of professionals from Shell and from PI as diagramed on the following page. The second chart describes the mode in which PI carries out the entire strategy, albeit in close communication with Shell.

's B. Action Group Location

It is important that the Action Group be geographically located to make strategy implementation as effective as possible, to minimize the amount of distraction imposed on Shell U.S. operating managers and to ensure the maximum informal contact with moderate critics.

It is PI's recommendation that the Control Group be located in Houston, as it is now, and that the Action Group be located in Washington, D.C. The reasons behind the selection of Washington, D.C., are as follows:

1. Media

Houston is distant from both the media and the activist heartland of North America. For most activist groups, the East Coast is the base of operations. Similarly, informal and continuous contact with the media is facilitated by a Washington, D.C., site.

2. Travel

In a related area, travel is hindered by a Houston location. While it is true that Shell U.S. officials would have no trouble traveling to meet with activists, the converse is not equally true. Activist organizations operate on limited budgets. Most do not have the means to travel extensively. Coming to and

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from Houston for meetings would be difficult financially; most activists, alternatively, would not want Shell U. S. paying for their travel for such meetings. A Washington location makes involving activists in Action Group programs much easier and with fewer "strings" attached. It also makes informal contact more likely (See below).

Public Policy

Public policy is a key target of the strategy.

Washington is the focus of influence and leverage for public policy. The formal and informal networking and discussions that precede and lead to public policy change cannot be carried out long-distance. The strong Washington office of Shell U.S. is evidence of this.-

Minimizing Management Disruption

Placing the Action Group, with all of its activities, meetings and initiatives, within the Houston headquarters would disturb the operations of Shell U.S. The Action Group's activities and the attention they receive might prove a major distraction for Shell managers.

Establishing a Middle Ground

Indeed, placing the Action Group in Houston might only lend fuel to activist fires by implicitly confirming that Shell U.S. is a sort of decision site for Shell affiliate programs and operations. A "middle ground" entity, as the recommended Action Group location, could help underline the decentralized posture of Royal Dutch Shell and its affiliates while preserving Houston's full control of the operation.

Moreover, activists are normally reluctant to meet at the corporate headquarters of companies with whom they are at odds. Such headquarters are overwhelming to activists who are used to smaller organizations. A small, more neutral meeting place is usually welcomed by activists and establishes a tone and tenor which makes them more amenable to discussion rather than diatribe or confrontation.

Employee Morale

As the boycott and other activist pressures are increased, especially if these involve churches more deeply, the media and attention focused on the Action Group might affect the morale of Shell U.S. employees.

Keeping these employees on Shell' 5 side, indeed making them spokespersons for Shell, is a major component of the strategy. But they must be involved at points dictated by the strategy, not by the media or the activists.

Informal Contacts

A Washington, D. C. location for the Action Group would facilitate informal contacts between Shell U. S. (particularly its permanent representatives to the Action Group) and the activists. Simple encounters and favors such as dropping off materials by hand or sharing a cab to a meeting can lead incrementally to more open and less hostile discussions and perceptions. The ability to take advantage of such informal situations is a major asset of a Washington location. Without it, dialogue and discussion between Shell and activists, churches, etc., would take place largely in formal, scheduled settings. It has been PI's experience that such settings, necessary though they are, do not generate (and indeed can hinder) incremental progress and understanding.

Cooperation

Similarly, a Washington location allows Action Group staff and activists to build mutual trust by cooperating on spontaneous projects where their viewpoints merge. For example, the work and close liaison between the Action Group and the Episcopal Bishop of Washington, perhaps the most important and most level-headed church leader dealing with this issue, and the various South Africa groups he chairs, could be a most critical element in neutralizing the boycott and in containing the churches. The success of a strategy dealing primarily with the churches could very well depend on these delicate relations.

Third-Party Advocates

The worlds of the activist, the consumer advocate and the public policy expert can be extremely small. Whatever the issue and however far apart the contending parties, they will almost certainly have professional acquaintances in common. A Washington location can facilitate the use of such third- -party associates as conveyers of informal messages between the Action Group and activists. It has been 91' 3 experience that this use of informal third-party mediators would be extremely

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useful in helping the Action Group understand the activist World add vice versa. But, given the circumscribed world in which the activist lives (at least in terms of non-activists), most of these third-party players are in Washington, D.C., and New York.

III. Determining and Ensuring Coordination

Importance

The Shell U.S. boycott cannot be neutralized or ended through action in North America only. Shell U.S. has no control over the apartheid issue; nor does it have control over events and actions dealing with Shell South Africa. Even though a boycott in Europe may be harmful to the affiliates, we believe that a European boycott may not be as widespread and broad-based as a North American boycott can be. Issue oriented consumer boycotts are primarily a North American social and political phenomenon. The grassroots in North America tend to be more prone to organize into political action or "citizens action" initiatives or groups. The whole civil (human) rights issue in North America has been very pervasive and nagging and has affected the moral and ethical fabric of our society since slavery was brought to North America.

Those who fought successfully in the civil rights movement in North America are now applying their resources and strategies to destroy apartheid, one of the last vestiges of human humiliation and discrimination. To that end they will use all the tools of international politics, diplomacy, pressure and networks, in a highly sophisticated global effort. The intent is to hurt Shell in North America economically in order to force political and economic action on the part of the Royal Dutch Shell Group.

This is exactly the way Leon Sullivan, Tim Smith, Jesse Jackson and several other key leaders of the anti-apartheid movement have stated their goals for the Shell U.S. boycott. Confronted with that kind of a well coordinated international effort, the pressures applied on Shell U.S. will be strongly supplemented with political/economic/violence pressures and through intellectual terrorism against Shell's affiliates.

Although there is no question in our mind that even though the primary effort and the focus of Shell U.S. action to neutralize or contain the boycott will take place in North America, a level of effective, well-coordinated action will be necessary in Europe and South Africa. The following actions are recommended as some of the basic ingredients needed in a well-integrated Shell strategy.

Recommendations

1. Permanent Representatives

We recommend that representatives of Shell U.S. and, importantly, Shell South Africa (see below) be part of the Shell Control Group or of the Action Group. Such permanent representatives could have six basic roles:

- a. Representatives know their affiliate's management and organizational structure. They can facilitate Action Group activities which require affiliate cooperation and can aid the Group's staff in determining which actions will work within any particular affiliate.
- b. Representatives, given their knowledge of the affiliate, can quickly and efficiently locate people in the affiliate who can answer technical questions or speak about particular problems or policies from experience. This role often greatly reduces Action Group staff effort, and thus ensures that budget resources are effectively spent.
- c. Representatives are the prime communication vehicles between the Action Group and their affiliates' top management. They can provide daily revised status reports on strategy implementation. Because they are involved in advising on resource allocation decisions in the Action Group, they can also provide immediate information to affiliate management on the accomplishments and objectives pursued. This immediacy of reporting and information can be achieved without distracting Action Group professional staff from carrying out strategy tasks, once again contributing to the most effective utilization of resources.

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d. The presence of representatives makes communication and coordination with, and the understanding of, top management instant. This can be particularly important in crisis situations, which can be expected in the unfolding of South African events over the next several years. We foresee several of these difficult crisis situations developing when dealing with highly emotional and sensitive issues. Management's quick understanding of the situation will prevent undue concerns, fear or apprehension over such an unfolding situation.

e. As implied above, the presence of representatives ensures an economy of resources, diverting fewer people away from strategy implementation to report to Shell managers. These representatives can also ensure that there is no duplication of resource allocation between the Action Group and affiliates in accomplishing tasks (e.g., in the development of employee strategies).

f. At times, the most senior managers of Shell's affiliates will be needed to participate in meetings with activists, churches, governments, etc. Representatives can serve as a filter to ensure that the most appropriate use of the managers' time is made and that the manager is well-briefed on the task required. Because the representative is an experienced Shell employee, his or her insights and judgment on these issues are essential and cannot be replaced simply by using Action Group staff as points of liaison.

Strategy Briefings
We recommend that once this strategy document is approved by senior management in Houston, thorough briefings be given in London, The Hague and South Africa for senior management and for the public relations staffs.' PI is prepared to assist in this capacity. During these briefings and discussions, close coordination of the overall effort can be developed. A commitment by senior management and interested staffs in support of the basic actions and coordinated efforts proposed here will be very important to assure success in dealing with the boycott in North America.

E

Communications

We recommend that a special direct channel of quick communications be established between all units dealing with the boycott activities in Shell 0.5., the Action Group, Shell South Africa, and Royal Dutch Shell. The communication channel would free normal business communications channels and would assure quick action and responses.

Shell South African Representatives

It will be critical that a representative of Shell South Africa be an integral part of the coordinating mechanism.

There are a number of reasons for this:

a. Activists operate and build on limited facts or rumors, mostly on anecdotes. It is necessary to have someone familiar with the actual operations of Shell South Africa to place allegations in perspective or to refute them quickly.

b. Only a South African with in depth knowledge of the operations there, can fully explain the way in which the peculiar systems of South Africa work. For example, to state that Reitspruit provided family living facilities for 70 per cent of its Black workers makes sense only if you know that the law prohibits provision of such facilities to more than three per cent of such workers.

c. Various policies must be explained in a historical context; and only a South African can readily and ably place such policies in context, e.g., the difference in British versus Afrikaner attitudes towards apartheid.

d. Solution to problems which seem workable in the North American experience may not be workable in the South African milieu because of basic internal differences, e.g., tribal differences; within the South African Black community unknown here.

e. An individual perceived as a reasonable south African Shell employee makes it more plausible that Shell South Africa can have reasonable policies toward apartheid.

, f. An individual who is familiar with the individual aspects of Shell South Africa can explain the ways in which the company works there with first-hand knowledge and minimize the potential for misrepresentation by people here.

9. Creative ideas about policies and acts which Shell South Africa could undertake are more likely to be generated by someone with a direct knowledge of the company and the environment there.

b. An individual with solid familiarity with Shell South Africa would instinctively know to whom to go for information and thus speed the process in addressing issues and acquiring needed information about that affiliate's operations.

The ideal individual to fill this role would be:

1. A native South African; Black if possible.

2. A long-time Shell employee familiar with most aspects of the company.

3. A person with a strong religious affiliation and commitment.

4. An individual with a sincere commitment to the end apartheid.

5. An individual with sufficient vitality to endure a grueling schedule and a fast education.

The individual chosen by Shell South Africa would be given extensive training in the U.S. on how to deal with the media, in public speaking, in debate and in group persuasion so that he or she would be an effective representative of Shell South Africa.

IV. MEANS OF COORDINATION

There are seven means available for ensuring adequate coordination and communication. These are as follows:

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Regular visits of affiliate managers to the Action Group to better understand its objectives and operation and return visits by Action Group managers to affiliate operations to better understand their problems and the effect of activist programs on their businesses;

Use of affiliate representatives;

Development of an internal newsletter on strategy implementation achievements and the Action Group's operations for distribution to Shell managers;

Development and distribution of fact sheets on the South Africa activist problem and the Action Group's responses;

Personal briefings for Shell top management in various Shell affiliates by Action Group managers and technical professionals;

Management seminars, as requested by the Control Group and conducted by the Action Group, for key Shell U.S. managers, especially those most directly in the activists' line-of-fire, to assist them to understand the problem and the Action Group's initiative and resources;

Development of programs to train local Shell U.S. managers on techniques for dealing with and responding to the media, churches, civil rights groups, etc. It is such managers who represent Shell 0.5. in the eyes of local communities. The quality of their response and the state of their knowledge regarding the programs of the Action Group will be a critical factor in determining how the effort is viewed within constituencies which the activists are trying to attract.

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STRATEGY EVALUATION

PI will apply its five-step system for evaluating the effects of issue management plans to assess the Shell strategy. The five steps

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Use of the EW/RAM system as a base for determining and measuring changes in position of churches, unions; educator organizations and Civil Rights groups toward Shell and disinvestment issues; -

Use of a computerized system to provide a detailed evaluation of changes in the amount, geographic distribution, nature and attitude of print media treatment of the Shell issue as the strategy proceeds;

Use of the computerized system to regularly perform a similar content evaluation of direct communications (letters, telexes, etc.) received by Shell 0.8. on the South Africa issue. Changes in print media treatment can then be compared to and contrasted with changes in attitude of those consumers motivated to contact the company. This comparison can be carried out by geographic region as well as by other factors.

Conduction of perception surveys of the general public (random sample), opinion leaders (stratified sample), and credit card holders to establish a base line of data on perceptions of Shell on the South Africa issue and on issues of disinvestment in general. A second, comparative survey will be undertaken at a future point to be determined by strategy managers to evaluate whether major progress, as perceived by those managers, is reflected in positive changes in attitude among the three target audiences.

Aggregation of specific quantitative data on progress in the implementation of each of the strategy's components, with regular progress reports to Shell 0.8.

II. METHODS

Position Change in Key Groups - EW/RAM

Throughout the strategy proposal, the importance of key groups to success of the strategy has been emphasized.

Those groups are:

0 Churches

0 Civil rights groups

0 Unions ,
o Associations of educators.

An'essential part of the strategy is to see that these groups remain outside the boycott and, where possible, actually become active leaders in rejecting the boycott and broadening the debate on disinvestment and post-apartheid South Africa. It is, therefore, crucial that the success of this effort be carefully, regularly and repeatedly evaluated over the life of the strategy.

As noted in the intelligence section of this proposal, EW/RAM sets the intelligence stage for the proposed strategy, and during the play tracks the who, what, where, when and how of the actors. The analytical process of EW/RAM will provide a key tool in determining changes in the positions of key actors. Collecting information from all sources and specifically from the critics themselves, processing that information to make it suitable for analysis, preparing an analytical product suitable for corporate decision making, and disseminating of that product to those decision makers will be a continuous function throughout the implementation of the strategy. This process, together with activities in the individual strategy components targeted at key groups, will result in timely identification of position change in those groups.

To evaluate that change and to compare it to the strategy's level of effort, it is necessary to measure three things:

1. The importance of a target organization to the strategy.
2. The nature of the organization's position.
3. Change in that position over measurable periods of time.

The following "weighting" system would be used to measure those three points:

1. Each individual church group/denomination, union, civil rights group, and educator organization would receive a weight for the strategy. The professional judgment of senior strategy managers will be used to assign weights to individual organizations. Weights will be as follows:

-- CIUCiaI, UQSO
-- important, worldwide
important, in a geographic focus
-- limited influence
not influential

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NEPTUNE STRATEGY TIMELINES

PI has begun anticipating the management needs of the Neptune strategy by studying how the plan's components work together and charting them on a series of timeline schedules.

On the following pages are computer printouts of preliminary timeline schedules for each component of the strategy in the order in which they appear in the Neptune strategy notebook. Each is followed by a "Pert" chart, which graphically demonstrates how the tactics work together.

NOTE that these timelines are intended only to be general at this stage. Each tactic is the equivalent of a timeline task. As the time to begin carrying out the strategy nears, each tactic will be assigned its own timeline schedule and set of tasks needed to carry them out.

At the back of this section is an example of a more detailed Version of the news media strategy.

- 2.
- 3.
- 4.

Organization

Name

- 5.

A seven-point spectrum of boycott positions (possibly also for disinvestment, or any other issue position deemed important to strategy success) be utilized for each organization, as follows:

i 3 -- opposes boycott with official policy statement or with other recordable document and plays leadership role with other organizations in its category to reject activist position;

i 2 -- as above, but without leadership role;

a 1 -- opposes boycott in talks with Action Group or others, but is not on record as opposing;

undocumentable;

0 -- neutral on boycott;

- 1 -- tacitly supports boycott, does not officially endorse or participate;

- 2 -- endorses boycott, but does not actively participate;

- 3 -- endorses boycott and actively promotes and participates.

Positions, or shifts to positions, 0 and above will be considered positive in terms of the objectives of the proposed strategy. This also applies to the computation of change; i.e., if an organization is neutral and remains so, this will be defined as a positive outcome.

The tracking matrix for organization change is as follows (the example reflects the boycott issue only; additional columns can be added to track other issue positions such as disinvestment):

Organization Baseline Position Position etc.

Factor Position Time 1 Time 2

Date Postn Date Postn Date Postn

It will then be possible to measure not only change in position, but also the length of time required to produce change and to control for the importance of the subject organization. Each organization at any point can be scored by using the following method:

Score : Organization Position at Position at
x _

Factor Time A ' Time A-1

Where: Time A : most recent measure of position
(current at time
of measurement)

Time A-1 : last previous position (for purposes
of

sequential evaluation) and baseline
(original)

position (for purposes of end-strategy
evaluation)

6. This approach allows a crucial organization making a
small positive change to reflect the organization's
importance for or impact on a marginal organization
making a large positive change.

The maximum positive score for change over time is 30,
i.e., a crucial organization which has joined the
boycott changing to take a leadership position against
the boycott (i.e., $5 (3 - (-3)) : 30$).

The maximum negative score is -30; i. e., a crucial
organization which has been a leader in opposing the
boycott changing to join the boycott (i. e., $5 (-3 -$
 $(13)) : -30$).

For the manager, this approach gives a broad measure of
the relative progress for two aspects of organization AL
change. The system assists in identifying weak or
problem organizations within a strategy component (e. g.,
the deteriorating position of a particular denomination
within the church strategy) Which can then be compared
to staff level-of-effort, with subsequent adjustments
made to programming.

Second, the system can also compare strategy components
to one another (e.g.s churches versus unions) to
determine progress of the strategy in creating positive
position change. With that knowledge, managers are
better able to shift resources among components to
ensure that effort is targeted at key or emerging
problems in an efficient and timely manner.

Attached to this evaluation paper is an example of how
the scoring process described would aid a strategy
manager in these two decision processes.

Section III of this evaluation proposal will discuss the administration of this and other parts of this evaluation system within the Action Group.

B Print Media

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Pagan International recommends using a computerized system to provide an accurate analysis of the type of news coverage being generated on Shell on the South African issue. Most importantly, this state-of-the-art system will also isolate the sources of the media attention; break the coverage down w by geographic region and issue trends; and identify writers and publications disposed for or against Shell. The system will thus be useful not only for evaluation, but also for periodic strategic adjustments in media efforts.

The system will operate as follows:

Using clippings, provided by Shell from their current clipping service, researchers, with a full briefing and background on the South African issue (and other key Shell - issues if desired), will read all media coverage. Through qualitative and statistical analysis, Shell U.S. would be provided with detailed information on media coverage, such as:

- o What are the opposition's key arguments nationally and regionally?

- o How are newspapers editorializing on South Africa, on Shell, and apartheid? (other issues, if desired)?

Demographically?

- o Is the press reporting on these issues in a fair and balanced manner?

- o Are there any emerging trends that could affect the strategy of a campaign?

- o Which reporters are writing favorable, unfavorable or neutral pieces about the Shell South African issues? (and other issues, if desired).

- o Is most of your press nationally and regionally covered by national wire service reports or by individual journalists?

- o Perhaps most importantly, who is generating the unfavorable stories about Shell?

To implement the system, PI would develop a list of key issues of interest to Shell associated with South Africa,

ranging from specific Shell mentions to South Africa and apartheid in general. It is of utmost importance that search terms used by the Shell U.S. clipping service be reviewed to ensure that Shell has maximum coverage of the media. Based on this media analysis, PI will develop a comprehensive list of all anti-Shell and pro-Shell arguments to help produce a much clearer picture of those arguments appearing in the press with greatest frequency.

This could be highly useful, for example, in determining the effect of the strategy and action plans or determining adjustments in the strategy regionally, nationally or by state. PI would add new issues and arguments once the service begins to help identify growing trends that should be monitored. This trend analysis, when coupled with the in-depth analysis available through EW/RAM, can make a critical difference in Shell's ability to react quickly with an appropriate public affairs response.

The system draws its information from all print media generated in the U.S. and provided by Shell U.S., including daily and weekly newspapers, business, trade and consumer press, newsletters and government publications. The program also can track and report on electronic media coverage.

However, obtaining transcripts may be costly and difficult to secure. Inasmuch as Shell U.S. already employs a national print media clipping service, the system simply requires either copies or originals be sent on a regular basis to serve as the foundation for the analysis.

All media coverage provided by Shell U.S. would be read and its gleanings transmitted into record form for subsequent data entry. A typical data record includes publication name, city, state, publication date, key issues covered, arguments covered (if any): whether the piece is an editorial, news story, letter-to-the-editor or opinion piece, favorability factor (favorable, unfavorable or neutral from the Shell perspective), whether the piece is from a daily, weekly, magazine, trade journal or government publication, byline (if any) and favorable, unfavorable and neutral source, if a source is cited in the story.

i Note that this service can be broadened to cover other issues of interest to Shell U.S. as outlined in the company's issue management program.

ht Media need not be the only sources of analysis. Note discussion of analysis of direct Shell communications in Section C.

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After data are entered into a computer each month, the information is processed and printed into a national report and, if appropriate, nine regional reports. The system will use statistical data bases that enable it to generate reports about very specific issues on a national, regional and statewide basis along with special reports by SMSA, city, county, even by Congressional Subcommittee. Special reports, by state or Congressional Committee, for example, can be made available if requested.

Monthly highlights and a detailed Executive Summary will be prepared with each Shell report along with cumulative data to keep the month in better perspective. In addition, cumulative reports can be prepared on a quarterly, semi-annual and annual basis. The Executive Summary will include a series of computer generated graphics which may be extremely useful in conjunction with presentations to management when describing evaluation results as well as graphically presenting data on a regular basis.

In addition, the system will provide meticulous details which can be put into the field for immediate use. PI would provide Shell U.S. with monthly reports of the names of all organizations; e.g. grassroots, individuals, documents and publications, and other "sources" of news and whether they are favorable, unfavorable or neutral, which are cited in Shell-related news coverage. In these cases, and as appropriate, the EW/RAM system will provide an in-depth analysis of the various actors identified by the media evaluation. The names provided are available both by occurrence and in alphabetical order and will help identify potential allies and opponents as well.

The system uses the "Fairness Code" developed with the suggestions of George Washington University's political science department, which includes a three-point system to determine whether or not journalists treat a subject in a fair and balanced manner. News stories are "red flagged" if they cover only one side of an issue without devoting some time to the opposition, if the reporter comes to any personal conclusions in a news story or if the headlines and photos used with the piece are out of context with the overall theme. Thus by using byline information Shell will also know whether journalists are relatively favorable. ' Shell U.S. or PI could then develop a comprehensive database of journalists sorted by issue so there is continuous record of who is writing about what and whether they are favorably, unfavorably or neutrally disposed.

,C.

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Direct Communications Evaluation

Using the same methodology described above, the Action Group will evaluate the nature and position of direct communications (past, present, and future) received by Shell 0.3. on the boycott and related issues. This will allow an evaluation of the changing attitudes of those who hold strong views on the Neptune issue (it is assumed that those who write are those who care more than the average citizen). In addition, this will allow comparison of changes in views of that core group with changes in print media coverage, as well as a tracking of that comparison by key factors such as geographic location.

Evaluating Perceptions

Perception measurement is an inexact science. In such complex and international situations as that faced by Shell, perception measurement must be used carefully and cautiously, and must be targeted at specific evaluation needs.

At the same time, it is important to recognize that knowledge of what people think about Shell now and in the future will be the only valid measure available of whether or not the strategy achieved its overarching goal -- i.e., to exit the boycott and disinvestment controversies with a positive public perception of the company.

Therefore, some amount of attitude survey work will be crucial to the evaluation package. However, given the complexity of the need, it is likely that the surveys will need to be undertaken by an outside, specialist organization. Although the parameters of these surveys will need to be determined in consultation with that organization's statisticians, it is initially suggested that the surveys target attitudes of three groups:

The general public (random sample);

Credit-card holders;

Opinion leaders (defined on the basis of socio-economic parameters to be set by the manager of the media stratng).

It is also suggested that two such surveys be undertaken. The first will establish a baseline for attitudes and must be conducted in the early autumn of 1986. This period is appropriate as a baseline for two reasons. First, the strategy will not be in place until the end of the summer,

and thus survey parameters cannot be determined until fall. Second, the fall will be the best survey time because it will be after the summer hiatus when media coverage will be more intense than during vacation months.

The second survey would be conducted at the behest of Action Group managers when the Action Group perceives that major breakthroughs have been made in resolving the Shell problem. This second survey will determine whether that "resolution" is (a) perceived by the target groups, and (b) resulting in a more positive perception of Shell 0.3. as a company and as a "good citizen."

Implementation Status

The proposed Shell strategy is multi-faceted and complex. In addition to the evaluation methods set out above, therefore, it will be essential to track the status of individual components of the strategy to document timing and level of effort.

Thus, for each component quarterly reports will be developed to track implementation progress and level of effort. Within this reporting process, we will make the best of opportunities for evaluation. An example will illustrate this procedure.

As noted in the strategy document, the universities are an important target for containment and diffusion of the Shell boycott and disinvestment issue. Examples of the types of tracking categories (and possible evaluation points) might be as follows:

Libraries

- 0 Numbers/nature of materials distributed to libraries

- 0 Numbers/location of resource centers created

- 0 Students

- 0 Numbers of internships

- 0 Numbers, geographic distribution of students in seminars addressed by Shell managers

- 0 Numbers of students on Shell-sponsored South Africa visits

- 0 Post-visit questionnaire to be filled out by students on return trip

- 0 Numbers of college campuses visited

- 0 Changes in numbers of demonstrations at target campuses

Faculty .

- 0 Baseline count on academic

- o Publications/articles, by whom, when, and in what journals/forms, with simple content analysis on position reflected

iv.

0 PC data base to track changes in
i numbers, authors, outlets for articles
t subjects

t author numbers, positions :

0 Assessment in year three of strategy to determine
new course offerings, seminar topics, etc. at target
schools (via survey)

0 Numbers of papers commissioned; number of
applicants; number of papers distributed and
geographic spread of distribution; track of types of
organizations requesting copies of commissioned
papers.

III. EVALUATION ADMINISTRATION

Administration of these various evaluation methodologies will be
carried out in three modes:

0 At the outset of strategy implementation, Action Group
managers will develop and distribute to component managers
specifications for their progress reports to management. This
will generate data for assessment of Implementation Status.

0 Working with the managers of the church, educator, Civil
Rights, and union components, the EW/RAM analyst assigned to
the Shell strategy will implement the Position Change
methodology for these key groups. Reports will be submitted
to Action Group management on a regular basis.

0 Those implementing the media and opinion survey evaluation
instruments will be authorized by and will report directly to
Action Group management.

Quarterly reports on all of these evaluation methods will be
provided to Shell U.S. management. 1

IV. ASSESSMENT OF COST EFFECTIVENESS

The results of all five types of evaluation methods will be
compared regularly to budget expenditures by strategy component.
However, it is recognized that the individual components are not
closed systems. That is, for example, while changes in church group
positions may be, in part, a result of undertakings specifically in
the church component of the strategy, change may also be in part be
caused by media initiatives or even a particularly cogent academic
paper commissioned by the university component. It is therefore
unrealistic to attempt to assess specific component budget
expenditures against specific component changes.

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V, Judgment and experience must always be applied in assessing cost effectiveness.

Nevertheless, given the importance of applying resources in the most effective, economical fashion possible, Action Group managers will regularly compare orders of magnitude of component expenditures; to progress and product on individual components to identify areas in which expenditures are clearly out of line with expected product, and will make strategy and budget adjustments accordingly.

ADDENDUM:

Example of Use of Position Change

Methodology to Evaluate Organization Shifts

As noted, there are two types of comparisons to be derived from the proposed methodology: comparison of change among individual organizations within a strategy component; and comparison among components.

A. Intra-Component Comparisons

Assume that there are six church denominations at issue for the manager of the church component of the Shell strategy.

Assume also that after the initial quarter of strategy effort, the matrix for those six denominations appears as follows:

Denomination Factor Original Position Changed Position
Score

Crucial A 5 0 #2

el0 a

Crucial B 5 0 -3

-15

Important A 3 1 t3

6

Important B 3 -1 -2

- 3

Marginal A 2 0 t3

e 6

Marginal B 2 0 t1

t 2

Clearly, the church component is in a net gain situation.

More organizations have made positive moves than negative.

Moreover, the scores, combining organization weight and

degree of position change reflect a net positive position (s24 versus -18);

However, the manager of the church strategy manager derives three serious cautions from the matrix:

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- o The positive/negative balance is close; more effort in the strategy is clearly needed so that the entire strategy does not slip into a negative position;
 - o As between the two losses, Crucial Denomination B is by far the manager's priority (-15 versus -3);
 - o More focus needs to be placed on crucial denominations in general. The arguments which the church strategy manager has incorporated into his approaches to churches seem to be working well with Marginal denominations, and those Important denominations which weren't already pre-disposed to support the boycott are coming along. But, the manager needs to closely examine the need for alternations in his tactics vis-a-vis the Crucials. See page 4 for details on organization factors, position weights, and scoring methodology.

B. Inter-Component Comparisons

However, what looks like a need for more resources and effort to the church manager may not be so compelling to the managers of the overall Shell strategy, because they must evaluate the church component's relative success and relative position change against other components. Having examined the individual matrices for each of the key components of the strategy, the overall managers' inter-component comparison might appear as follows:

Component	Total Positive	Total Negative
Unions	t10	-15
Churches	t24	-18
Educator Groups	s20	-10
Civil Rights Groups	s15	-15

Although the church manager perceives a need for more resources, the overall strategy manager may want to suggest that he concentrate on developing new approaches with existing resources because the central manager may feel that he has bigger problems than the churches. Unions have

- 13 ?

slipped into a negative position, and the Civil Rights groups are in danger of also being in a net negative position. It is these two components, particularly bolstering the Civil Rights activity, that might require resource shifts.

Yet, it must be recognized that it will remain the central manager's judgment that must govern the resource allocation decision, judgment that will weigh the results of the evaluation together with the relative importance of each component to the overall Shell strategy and the realistic assessment of what actions can in fact be undertaken to resolve problems in individual components of that strategy. The evaluation system proposed is designed only to give rigor and structure to what is in essence and will remain professional judgment.

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