

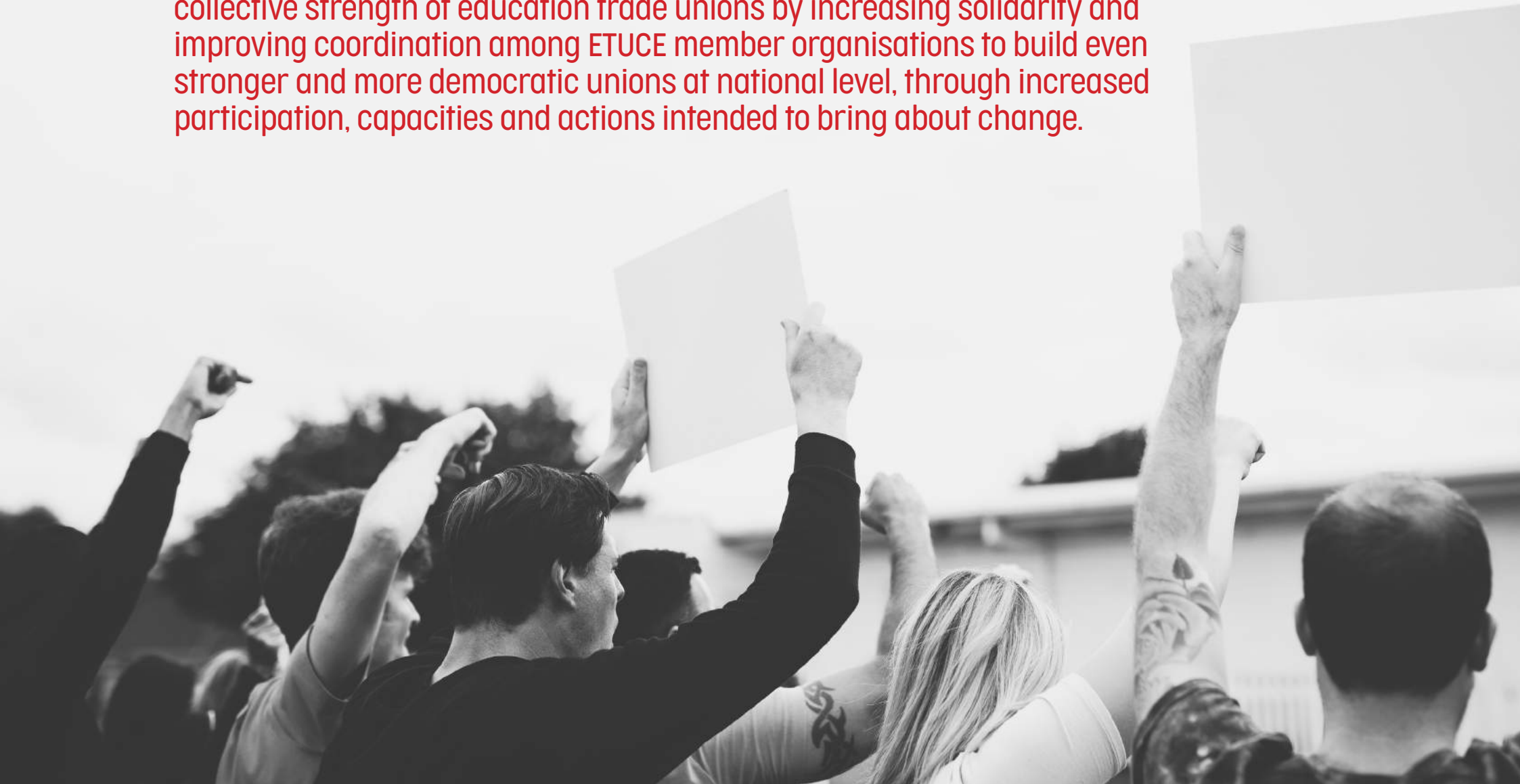


ETUCE ACTION PLAN

ON ORGANISING AND RENEWAL

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The **ETUCE Action Plan on Organising and Renewal** aims to build the collective strength of education trade unions by increasing solidarity and improving coordination among ETUCE member organisations to build even stronger and more democratic unions at national level, through increased participation, capacities and actions intended to bring about change.



BACKGROUND: OLD AND NEW CHALLENGES

Across Europe, the working lives of teachers and other education personnel are challenged by transformations in society. Powerful ideas and narratives about public education are increasingly shaping the nature of the work of teachers and other education personnel, and framing what becomes a general understanding of the purpose of education, the resources that are committed to achieving these purposes, and the way in which schools and other education institutions are organised and governed.

The impact of such ideas is different depending on whether teachers and other education personnel are in a position to help determine them or are their targets. For many years, all forms of social dialogue, and collective bargaining in particular, have been key instruments to guarantee that the democratic voices of education trade unions as the legitimate representatives of teachers and other education personnel, contributed to shape public policy in education, their world of work, and the respect for their status. At the same time, the public sector has played a positive and important role in counterbalancing the effects of the private, for-profit sector.

In recent decades, the dominance of market mechanisms and thinking in the education policy debate and in other public services, cuts in public investment, deregulation in the labour market, liberalisation, education reforms, changes generated through digital transformations, and demographic trends, including ageing among education personnel and activists, have altered the organising environment. In addition, there have been attempts to restrict or avoid social dialogue, the involvement of education personnel through their unions in policy consultations, and to limit or undermine the scope of collective bargaining. These developments, for education trade unions in Europe, represent profound changes. They have increased burdens on teachers and other education

personnel and have increased pressures on the capacity of unions to support members at a time when the organisational resources of many unions are declining.

Many education unions, although not all, have been facing eroding membership and reduced member involvement. This is, in part, related to the changing environment that may weaken the influence and impact of trade unions at the bargaining table and their ability to shape public policy, including the support of universal, free, quality education. The combination of these trends has led several ETUCE member organisations to enhance their organisations around the most important force they have: their current and potential membership.

In several countries/unions, this has meant refocusing union organisational capacity to meet the needs of those who have not been involved in trade unions, often at the margins of the labour market, to connect with young people and other under-represented groups, to reframe the narrative and to develop a stronger presence in different, but inextricably linked contexts; the workplace, but also in the community.

Recognising these challenges and practices, the ETUCE Special Conference meeting in Athens on 27-28 November 2018 adopted the Resolution *Shaping the future of Europe: the role of education trade unions*¹. The Resolution called on ETUCE and its member organisations to give priority to strategic discussions and actions on organising and renewal.

¹ https://www.csee-etuce.org/images/attachments/RS_The_Future_of_Europe_The_Role_of_Education_Trade_Unions_ADOPTED.pdf

ETUCE ACTION PLAN ON ORGANISING AND RENEWAL

The ETUCE Action Plan on Organising and Renewal aims to:

- Present a **comprehensive and sustainable strategy** to ensure that all ETUCE member organisations are supported in their efforts to address within their structures, issues of renewal and organising.
- Re-enforce efforts to **strengthen the capacity of education trade unions** to reach in to their existing membership and/or those groups that are marginalised within the union, and to reach out to un-organised teachers and other education personnel, and to reach beyond to the wider context of trade unions and of other people in the education community who share the vision, purpose and contribution of free, universal, public, high-quality education for the development of more equitable, fair and democratic societies.
- **Maintain a permanent and active internal dialogue** between ETUCE member organisations on how education trade unions can act to leverage education personnel's right to organise and to protect themselves, to share a common vision and to articulate their own demands on quality education. This requires building the individual capacity of members to act collectively and to engage within the union to achieve progress as well as to grow collectively as a European movement through networking and information sharing.

The Action Plan builds on previous ETUCE work conducted in the frame of the project '*Your Turn: Teachers for Trade Union Renewal*' (VS/2018/0358). During 2018-2020, the project gathered ETUCE member organisations around a table to discuss challenges, definitions and priority areas for joint work at European and at national level for growing as unions around membership recruitment, density, engagement, and activism, in full respect of national organisational cultures and traditions. It also takes into account the research conducted in the frame of the project work and detailed in the report "**Your Turn: teachers for trade union renewal**"², the following "**Handbook for critical reflection**"³ including tools for contextualised reflection on a framework for transformative trade unionism, the "**Workshop methodology**"⁴ describing some educational activities for changing unions undertaken during the project period, and the "**Communication-kit**" for mobilising engagement, online awareness raising, and sustainable cross-national exchanges within the ETUCE family.

The Action Plan on Organising and Renewal **does not provide a blueprint for trade union renewal**. The national context and culture shape the way trade unions do things, and each union willing to engage in a process of renewal will follow its own path. The Action Plan should be understood as a tool to support ETUCE member organisations' work at national as well as transnational level in their reflection and mutual learning process.

2 https://www.csee-etu.org/images/attachments/ResearchReport_YourTurn.pdf
3 https://www.csee-etu.org/images/attachments/Handbook_YourTurn.pdf
4 https://www.csee-etu.org/images/attachments/Methodology_YourTurn.pdf

To make this commitment a reality at local, national, and regional level, a **transnational responsibility for mutual support** is central. Enhanced cooperation between ETUCE member organisations will be an added value for progress. Strengthening each organisation will fortify all.

The implementation of the ETUCE Action Plan on Organising and Renewal requires a whole education worker's approach contingent on winning the support of teachers and other education personnel as well as of the communities they are in for collective purpose and collective action through education trade unions. It requires a strong commitment to challenge the narrative that a decade of economic crisis and the rhetoric of austerity and management approaches to efficiency, which emphasise the role of the individual and of personal ambition as opposed to social aspirations, collective actions and solidarity. In this perspective, it entails working across all areas of ETUCE work and priorities but, in particular:

- Decent work, quality terms and conditions of employment in education
- Social dialogue, collective bargaining and trade union rights
- Equality
- Education professionals
- Campaigns for quality education for all, and against privatisation and commercialisation in and of education

At European level, ETUCE commits to **regularly monitor** the implementation of this Action Plan and activities undertaken to make trade union renewal a reality at all levels.



DEFINITION OF UNION RENEWAL: SETTING THE PRIORITIES

Trade union renewal can be defined as the process of *'building the organisation from within, through the engagement and development of its membership'*⁵. Recognizing that members are the engine for change, and looking at organising beyond the current membership, Bascia and Stevenson (2017) unfold the strategic commitment for union building into four key dimensions:

- Building union membership
- Building member participation and engagement
- Building member skills and capabilities for union organising and leading
- Building member commitment and identification with the union

The research conducted during the project, built upon experiences and exchanges between ETUCE member organisations, adds a dimension to the definition of union renewal:

- Building activity and actions [intended to bring about change]

During the four meetings that gathered more than a hundred representatives from ETUCE member organisations across Europe, participants discussed the main features of trade union renewal. They discussed the key challenges for trade union renewal and focused on different organisational approaches for developing the collective capacity and action in and through education trade unions to grow as unions for the benefit of all workers in the education sector, and the education community.

The Action Plan is built around the following key themes:

1. ORGANISING FOR EQUALITIES: **MOBILISING THE UNDER-REPRESENTED**
2. ORGANISING AROUND **IDEAS AND CAMPAIGNS**
3. ORGANISING AROUND **WORK, COMMUNITY, AND SOCIETY**
4. ORGANISING AROUND **PROFESSIONAL ISSUES**

These four themes have been identified as priority areas of engagement by ETUCE member organisations during project activities. They are associated with challenges that were among the 'seven key challenges for trade union renewal' drawn from Bascia & Stevenson (2017) and summarised in the table annexed to this Action Plan. They are by no means intended to be exclusive, as the challenges each education trade union might encounter depend on the context in which every union works.

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N. Bascia and H. Stevenson, *Organising teaching: Developing the power of the profession*, 2017, Education International

The recommendations under each theme are divided into subcategories for complementary action at **European and national level**. The subcategories for actions to promote a process of renewal and organising to build trade union power are:

- **Analyse to understand the context and develop the direction**
- **Democratise change through open communication and engagement**
- **Shift thinking and develop skills through education**

The recommendations for action are not meant to transcend contextual challenges and traditions shaping the individual experiences of unions. They suggest potential and practical measures that can support the development of collective capacity of education trade unions to bring about change and to develop synergies at European level to address common challenges for union renewal originating in a larger context. The recommendations were submitted for comments and input at the ETUCE Conference “Your Turn! Teachers for Trade Union Renewal” in Brussels on 23-24 September 2020.



ORGANISING FOR EQUALITIES: MOBILISING THE UNDER-REPRESENTED

Equality in society, in education and in the labour market is a fundamental value for the trade union movement. Despite a broad consensus that diversity in society is an added value, treating union members as if they were a homogenous group with only shared interests is still a common practice within trade union structures. The risk is that trade unions fail to capture the diversity of the workforce in their own structures, with consequences for the understanding of the extent to which the status of some workers can worsen in relation to others. Some groups within the teaching profession, such as young teachers and other education personnel, those in part-time or short-term contracts, migrants, women, minorities, or LGBTQI risk being marginalised and/or under-represented in all aspects of trade union organisation, reflecting and deepening the fragmentation in the labour market and in society. How to bridge the fracture that emerges from these trends to better represent, to connect, as well as to attract those from marginalised groups who are not organised within the union, is one key issue to address to strengthen education trade unions.

CHALLENGES

- Develop the formal and the informal
- Build democratic engagement
- Connect the profession horizontally and vertically
- Work in and beyond the union (create alliances)

STRATEGIES TO ADDRESS THE ISSUE

Promoting diversity, embracing equality, and building solidarity in education, in the labour market, and in society are both aspirations and foundational principles of the trade union movement. By addressing issues that can reduce inequalities, including the structural and cultural changes in the organisation, education trade unions aim to ensure that specific groups who may be under-represented participate fully in the organisation, thereby influencing positive change in society.

ETUCE AND MEMBER ORGANISATIONS ARE ENCOURAGED TO WORK TO:

Analyse to understand the context and develop the direction

- Monitor and analyse tendencies in education trade union membership composition, including union density, age, gender, and ethnic group composition, and employment status, and overall diversity issues
- Collect data on factors preventing or discouraging specific groups who might be under-represented from joining or becoming active in unions as well as on how such factors could be overcome, on areas for membership growth or where membership is declining, or recruitment is presenting a challenge
- Adopt a broad approach when analysing diversity

Democratise change through open communication and engagement

- Gather experiences and favour reflection, mutual learning and the exchange of information, strategies, and practices on organising under-represented teachers and other education personnel among education trade unions in Europe
- Encourage common initiatives in areas such as precarious employment and the campaign for decent work, quality terms and conditions of employment and equality to link policies with organising efforts
- Discuss recruitment issues at all levels of the organisation including, where possible, developing strategic plans for recruitment
- Provide opportunities and space for self-organising among under-represented groups and structures that allow members to determine their own priorities and how they want to work
- Increase under-represented groups' connection, involvement, and democratic engagement in union structures by increasing their capacity to act collectively, coherently, and effectively and to mobilise, including through formal and informal networks and target-oriented communication strategies and diversified tools
- Reap the benefits of ICT tools to reach in, out and beyond current membership, and to the wider community, to broaden digital participation and engagement of those who are under-represented in union structures, meetings, and activities, and to favour a culture of inclusion of those teachers and other education personnel who might be less active within the union
- Implement specific arrangements to facilitate participation in education trade union work for groups that are under-represented (young people, precarious workers, women, etc.)

- Identify issues that are relevant for under-represented groups and bring issues that have been identified as relevant by under-represented groups into social dialogue processes and develop a comprehensive bargaining agenda to ensure that under-represented groups are represented there and that they are protected in their rights and contractual safeguards
- Cooperate and exchange useful practices within the trade union movement and with other actors (E.g. NGOs, civic and human rights' organisations)

Shift thinking and develop skills through education

- Organise trade union education and training programmes and exchanges on the promotion of diversity within union structures
- Provide education and training opportunities for under-represented groups
- Develop skills and capacities and activities of members through trade union education and training to better understand the diversity of teachers and other education personnel's need, to address and to advocate on equality issues in union policies and practices, and better communicate them within the education community and the larger society.

ORGANISING AROUND IDEAS AND CAMPAIGNS

The wide range of trade union collective actions and campaigns are profoundly rooted in national education trade union practices, organisational cultures and traditions, and embedded in specific organisational and institutional structures and resources. However, in much of Europe, a decade of austerity in public education funding and the dominance of market mechanisms and thinking in education policy, as well as attacks on collective bargaining and on the role and status of trade unions as the representative voice of educators in society, have challenged the image of unions and of public services and public sector workers in public opinion, 'de-mobilised' active members and led to a decline in the efficacy of traditional industrial actions, such as strikes over collective bargaining issues, and fostered distrust in human solidarity and collective action.

For decades, dominant ideas promoting the individual and individualised solutions rather than collective actions and solidarity have been promoted as the only viable options. Renewal efforts cannot be separated from work to reframe dominant narratives so that the values and aspirations of education trade unions for social justice, solidarity and sustainability are able to emerge as common-sense solutions to the challenges and crisis that confront educators, the school community, and citizens.

CHALLENGES

- Organise around ideas: reframe the narrative
- Build at the base

STRATEGIES TO ADDRESS THE ISSUES

To succeed in an increasingly hostile environment, traditional union campaigns are not enough to shift the balance of power and the dominance of decades-long market-based narratives and ideas. A shift in the public discourse must develop along strategic and comprehensive narratives rooted in the needs of communities and accompanied by the mobilisation of the collective resources of union members. Building shared alternatives and being actors of change requires engaging teachers and other education personnel in pedagogical and educational processes which form the basis of any change.

ETUCE AND MEMBER ORGANISATIONS ARE ENCOURAGED TO WORK TO:

Analyse to understand the context and develop the direction

- Collect data and analyse tendencies in power structures globally, regionally, nationally, and locally, and how these affect the world of work of teachers and other education personnel as well as the relative position of unions to secure progress
- Collect data and analyse trade union communication networks, tools, and strategies, including the strengths and weaknesses from the increased use of ICT communication tools in trade union contexts

Democratise change through open communication and engagement

- Gather experience and favour reflection, mutual learning and the exchange of information, strategies and practices on organising around ideas among education trade unions across Europe
- Favour exchanges and reflection on competing philosophies and practices in public education in Europe to raise awareness and understanding of different challenges, contexts, and identities
- Create space for democratic engagement in union structures at all levels to discuss strategies and develop greater involvement
- Encourage active participation in global and European education union campaigns and promote an active role in supra-national work
- Promote the direct engagement of teachers and other education personnel organised within the union in European and international meetings to raise awareness on the similar challenges to the profession and to build solidarity across the board
- Build a sustainable network of education trade union communicators
- Encourage member participation in transnational campaigns through a strategic use of social media and include international dimensions into national campaigns to increase the chances of successful lobbying of politicians and decision-makers
- Promote digital activism to broaden participation and support for education trade unions' calls and campaigns, and to enhance space for democratic engagement, by reaping the benefits of ICT tools to reach in, out and beyond current membership

- Increase efforts to enrich the public debate and to organise around ideas and values that can inspire and mobilise members and resources with a long-term vision, clarity of message and enhanced communication within the education community and the wider society on education as a public good
- Seek cooperation and joint action with the broader union movement and the educational community and society at large to build awareness and support on wider challenges affecting society and education within it (e.g. human, civic and trade union rights, LGBTQI rights)

Shift thinking and develop skills through education

- Organise trade union education and training programmes to develop member activism (activist development programmes) and identify and develop future leaders
- Develop trade union education and training programmes on broader socio-economic issues and/or on ideas, and assumptions shaping education, and on alternatives to dominant narratives
- Develop leadership capacities, skills, confidence, and competencies of members as organisers and persuaders, so that they can identify and interpret the impact of national and international political developments at the workplace, place union struggles at the workplace and in communities within a broader struggle against dominant narratives, and encourage others to bring about workplace, community, and social changes
- Develop skills on the use of ICT media and campaign tools for trade union communication and campaigns

ORGANISING AROUND WORK, COMMUNITY, AND SOCIETY

Building from core concerns, which might look different in different countries, nevertheless, at the intersection of every dimension of union renewal, is the need to develop trade union capacities and presence at the workplace. Whether it is in early childhood education facilities, schools, training centers, colleges or other education institutions, the challenges of inequality, fragmentation, enterprise-style managerial leadership, autonomy, competition and mistrust, and job quality are present in education and in society. They are reflected in all their complexity and heterogeneity at the workplace. Where workplace representation exists, the influence of a legitimate union can grow together with commitment, participation, and engagement of education personnel within the union. Workplace representatives can, in turn, act as organic links between members, un-organised teachers and other education personnel, and union structures.

Organising at the workplace is closely linked with **organising in the community**. Engaged, committed and active teachers and other education personnel also play a pivotal role beyond school facilities in their communities. Their workplace is, by nature, also the place where relations with parents, families and the community come together for the benefit of students and their education.

CHALLENGES

- Build at the base
- Connect the profession
- Organise around ideas: reframe the narrative
- Create alliances (work in, and beyond the union)

STRATEGIES TO ADDRESS THE ISSUE

Despite the challenges arising, especially when it comes to unions competing with other unions for membership and representation, building the union presence at the workplace and working with communities is crucial to leverage educators' right to organise to better defend the dignity and quality of work, to advance alternative narratives in the education policy framework, or challenge unequal power relationships by building mobilisation strengths. Overcoming silos, creating opportunities to participate in conversations around the concerns of teachers and other education personnel, the union's purposes and how to achieve them is a fundamental element of union democracy. By doing so, education trade unions are also actively involved in seeking solidarity and trust at the workplace, and broader alliances and coalitions in the education community and in society, to help secure union objectives.

ETUCE AND MEMBER ORGANISATIONS ARE ENCOURAGED TO WORK TO:

Analyse to understand the context and develop the direction

- Analyse relationships in the community (parents, students, employers, etc.) to understand the distribution of power and how to challenge any imbalances in the most effective way

Democratise change through open communication and engagement

- Gather experience and favour reflection, mutual learning and the exchange of information, strategies, and practices on organising in different contexts among education trade unions in Europe
- Encourage common initiatives and exchanges of union representatives within ETUCE to learn from peers on organising in different contexts
- Promote a culture of organising at the lowest point of the organisation (workplace) to foster the understanding that all education personnel are key actors in their community and that the primary agency for success is placed on the motivation of teachers and other education personnel to act collectively in schools and education institutions as well as in the community in which they reside
- Build union presence and dialogue at the base of the organisation (usually the workplace) by encouraging regular meetings between members and workplace representatives with educators on professional/industrial concerns, problems and issues that might arise within the community
- Reap the benefits of ICT to reach in, out and beyond current membership, and to the wider community to broaden participation and engagement, to favour a culture of inclusion, and to seek and to provide support to the community surrounding schools and education institutions
- Assess the benefits of holding hybrid meetings where the use of ICT can broaden participation without weakening the importance of face-to-face meetings
- Rethink the role of workplace representatives to strengthen the link between the union, members, activists, and the community (students, parents, NGOs, etc.) on shared aims

- Build solidarity across the profession and sectors of education by providing space for self-organising, dedicating time and resources to discuss and understand different challenges, and unite on core trade union principles and values of solidarity
- Engage in exchanges with the wider community on the root causes of inequalities in education and in society to challenge fragmentation, segregation, and isolation and reinforce unity, solidarity, and collective action
- Build coalitions and strengthen alliances with other relevant actors within the education community

Shift thinking and develop skills through education

- Organise trade union education and training programmes to build confidence, leadership, and organising skills of workplace representatives and on union democracy at all levels
- Organise trade union education and training programmes to enhance negotiation skills and to ensure members' voice at all levels is reflected in collective bargaining negotiations
- Develop communication (including listening) skills and capacities of workplace representatives through trade union education and training to better address broader challenges in their work, and to better communicate with members, non-members, within the education community and at different levels of trade union structures

ORGANISING AROUND PROFESSIONAL ISSUES

Education trade unions, particularly through workplace representatives, are an important voice for teachers and educators at the workplace. The reality of the daily work of teachers and other education personnel is shaped by material compensation for the provision of labour (salaries, employment terms, rewards, pension benefits, etc.), concerns regarding workload and organisation of their working time. However, it is shaped as much by the extent to which they can exercise professional judgement and autonomy on what and how to teach, how students are assessed, how technology is used and how their work is 'measured' and assessed. Research shows that there is no separation between 'industrial' and 'professional' issues. A teacher's experience at the workplace is inevitably a mixture of both. Representing the totality of teachers' work is a core issue for education trade unions in their attempt to ensure that teachers have a genuine independent voice in social dialogue and collective bargaining processes and to shape the discourse about quality education and support for the teaching profession.

CHALLENGES

- Work in and against
- Build at the base
- Connect the profession

STRATEGIES TO ADDRESS THE ISSUE

Education trade unions seek to promote the voice of their members in all aspects of their work. Their engagement around professional issues of teachers and other education personnel is central to build the collective capacity of the organisation. Organising around professional issues enables unions to engage members and to reach out to those un-organised teachers and other education personnel who otherwise might not participate in union activity, it develops member engagement and connections, and it builds union identity amongst the membership. It also develops the activist base of the union by opening-up opportunities for self-organising in which education trade union representatives and members work together to identify and address their own professional needs.

ETUCE AND MEMBER ORGANISATIONS ARE ENCOURAGED TO WORK TO:

Analyse to understand the context and develop the direction

- Monitor and analyse trends in education reforms in Europe and shifts in education policy debates globally and at local level that change the context and organisation of the work of teachers and other education personnel, including on the effective use of ICT in education, the status of the teaching profession, autonomy and influence over curriculum and teaching practices

- Monitor and analyse tendencies in social dialogue and collective bargaining in education in Europe on issues affecting the teaching profession and the role of education trade unions in defending and promoting the status of the teaching profession
- Monitor and analyse the connection between the political economy of public education and the way schools are organised and governed across Europe
- Develop education personnel-led research that involves both academics and educators themselves in the process so that analysis fully builds upon and reflects the views, expectations and knowledge of teachers and other education personnel

Democratise change through open communication and engagement

- Gather experience and favour reflection, mutual learning and the exchange of information, strategies, and practices on organising on the full range of educators' work among education trade unions across Europe
- Encourage common initiatives in areas such as education policy, investment, digitalization, professional autonomy, testing and standardization, and opposition to privatisation, including campaigns, in education that connect policy work with organising efforts
- Develop a comprehensive bargaining agenda, where needed, to protect teachers' rights in all aspects of their work and to effectively address teachers' professional issues within the European Sectoral Social Dialogue in Education

- Provide opportunities and space for self-organising within the union among teachers and other education personnel and structures that allow all educators to discuss their interests, challenges and priorities to be the teachers they want to be
- Increase educators' connection, involvement, and democratic engagement in union structures by seeking to expand their capacity to act collectively, coherently, and effectively and to mobilise, including through formal and informal networks and communication strategies and tools
- Build solidarity across the profession and across different sectors of education
- Focus on strengthening the connection and communication between all levels within the organisations for mutual support

Shift thinking and develop skills through education

- Educate educators through the provision of professional learning opportunities for teachers and other education personnel
- Develop skills and capacities of members, union representatives and activists through trade union education and training to better address professional issues at all levels, to better communicate and advocate them within the education community and wider society and to develop future union leaders especially amongst the younger generation of education professionals

ANNEX

ANNEX 1: SEVEN CHALLENGES OF EDUCATION UNION RENEWAL

(from N. Bascia and H. Stevenson, *Organising teaching: Developing the power of the profession*, 2017, Education International, pp. 55-62 available at https://issuu.com/educationinternational/docs/research_institute_mobilising_final_0a8567f65aa7fa)

The 'challenges'	An explanation
Organise around ideas: reframe the narrative	Policy solutions are developed within a framework of 'what is possible' - there is a need to shift public discourse and public thinking (so new solutions become 'possible')
Connecting the industrial and professional	Industrial issues relate to workers' terms and conditions and professional issues for educators relate to pedagogy and the curriculum - but these issues often cannot be separated, they are the connected
Working in, and against	Unions often have to simultaneously work with employers, while also pushing employers to go further to meet union demands
Building at the base	Deliberately building union capacity and organisation at the lowest point of the organisation
Build democratic engagement - develop the formal and the informal	Changing the organisation structure and 'culture' to make it easier (and more attractive) for members to participate
Connect the profession - horizontally and vertically	Working to represent all workers in the education sector - to include different status (principals and teachers), different sectors and different groups (regardless of age, gender, abilities, language, sexual orientation, ethnic group, religion and migratory and citizenship status)
Work, in and beyond the union, create broader alliances	Building coalitions with civil society organisations and community based groups

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