YOUR TURN!
Teachers for Trade Union Renewal

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Teachers for Trade Union Renewal

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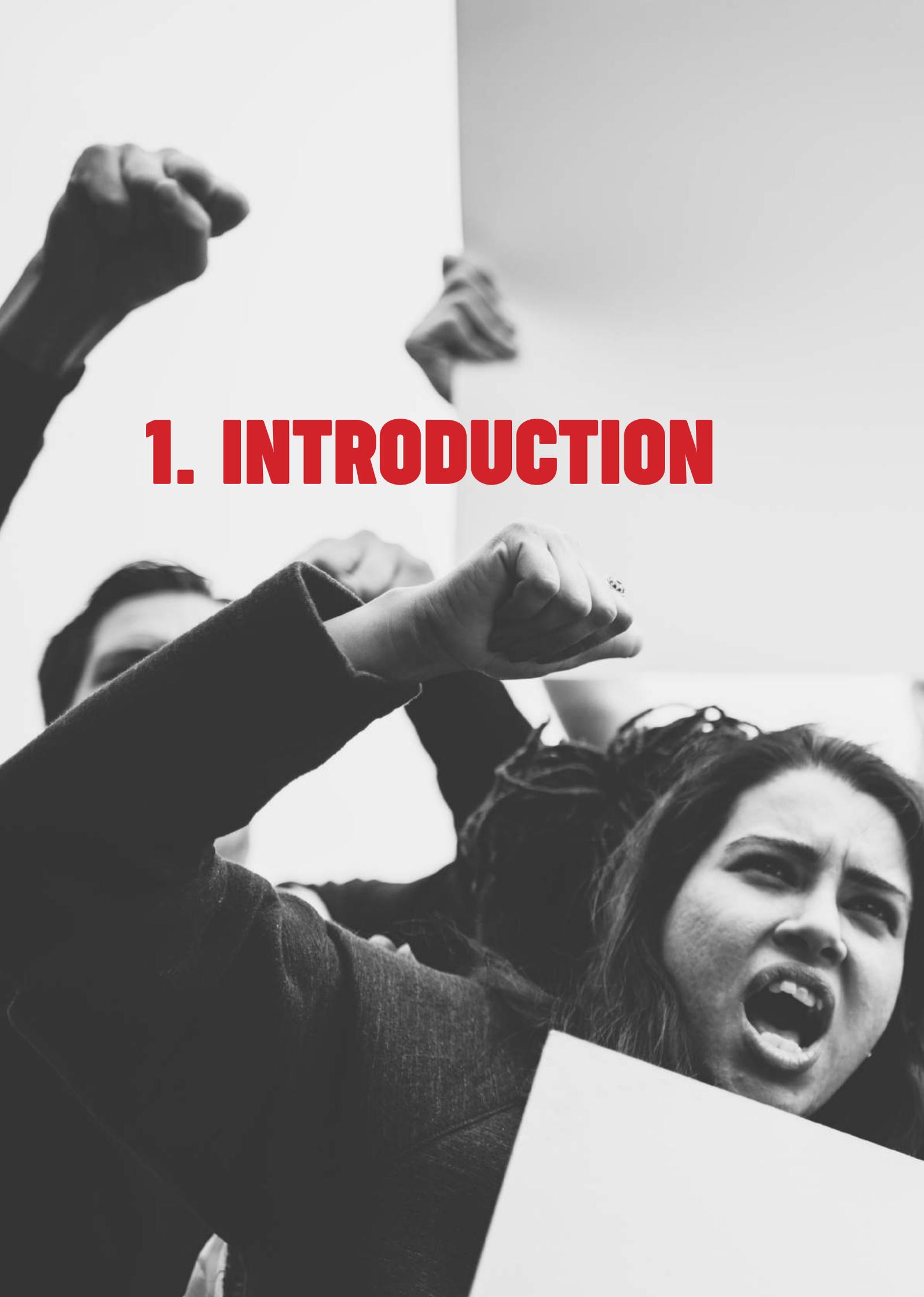School of Education, University of Nottingham.

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CONTENTS

1. INTRODUCTION

This report is concerned with the experiences of education trade unions in Europe as they seek to respond to significant changes both in the work of teachers and other education personnel and the wider context of trade unionism. The particular focus is on the strategies being adopted by education trade unions as they engage in processes of union renewal (Fairbrother and Yates, 2003). The work is based on research undertaken during the project *'Your Turn: Teachers for Trade Union Renewal' (VS/2018/0358)* and draws on secondary data sets, outcomes from three cross-European project workshops, a survey distributed to all ETUCE member organisations and a series of case studies based on interviews with education trade union officers (a full discussion of the methodology is provided in Appendix 1).

This research report is framed by the experiences of global crises. Its principal starting point is the experiences of teachers and other education personnel in the wake of the 2008 economic crisis as austerity policies were imposed by governments across Europe. Education services, and the people who work in them, experienced austerity particularly sharply (Stevenson et al., 2017), with a dramatic impact on jobs and the quality of working lives. As this report is completed, Europe appears to be slowly, and tentatively, emerging from a public health crisis that has closed educational institutions across the continent and had the most dramatic impact on the experiences of those who work in them. In many senses the report has itself been shaped by the coronavirus pandemic as the project had to respond to the impact of a cross-continent lockdown with project participants focused on supporting union members facing an unprecedented health and safety crisis.

However, many of the developments experienced by teachers and other education personnel following the economic crisis were not new, but were simply accelerated by the events of 2008. Rising workloads, growing precarity and increased intervention to prescribe and evaluate work in the sector were trends that were already well established in many contexts. Similarly, the experiences of teachers and other education personnel during the coronavirus pandemic are unlikely to automatically return to some form of pre-pandemic state once the public health crisis has eased. In particular, education workers are likely to find their working lives increasingly shaped by new technologies that were clearly present before the pandemic but which have become more embedded since. In such a world the influence of private sector technology corporations is likely to grow, with significant implications for both the work of teachers and other education personnel and system governance.

These are moments when those who work in education might be expected to look to their trade unions for protection as they seek the resources of collective organisation to defend their interests and the interests of their students and the wider community. However, trade unions themselves face their own challenges. Education trade unions have not experienced the same scale of difficulties faced by unions in other sectors but many have not been immune to the problems of falling membership and member participation with a concomitant impact on power and influence. Arguably the most significant crisis that trade unions face is the crisis of confidence that workers have in the organisations that have historically represented their collective interests. Oftentimes this perceived lack of relevance is shared most strongly by those who are most disadvantaged in the labour market – the young, the precarious and those who experience institutionalised discrimination in all aspects of their lives.

Readers can decide for themselves to what extent this prognosis reflects their experience or otherwise. Differing responses will in part be accounted for by the very different circumstances faced in different contexts. However, our assessment is that what is beyond dispute is that education trade unionists, wherever they may work, need to think in a rigorous way about the context in which they work, the challenges their members face and the steps they need to adopt to ensure that their organisations are able to effectively represent the collective interests of education workers and their communities. Such analysis is the start of the process of renewal and it necessarily involves facing up to difficult and sometimes uncomfortable questions.

We hope that this report will help inform such a process of reflection. It makes no claim to provide solutions because there are no simple formulas to tackle these problems, let alone ones that are capable of transcending the contextual specificities that frame the experiences of individual unions in particular locations. However, this report recognises there is much common experience and much that can be learned from sharing experiences and expertise. As this report illustrates, many education trade unions are already responding in innovative ways to complex challenges and here, through a range of case studies, we provide several examples of union renewal in action.

The main body of this report is presented in three sections. First, is a summary of the experience of work of teachers and other education personnel in the years following the economic crisis. This is necessarily an overview but it provides important context for subsequent sections. It locates developments in education workers' experiences of work in a wider context and also links these to future work scenarios. Second is a summary of trends in industrial relations, social dialogue and collective bargaining over the same period, with a particular focus on the experiences of education trade unions as reported through the project survey. Third we present a number of 'organising themes' as a way of thinking about union renewal strategies and for each theme we provide two short case studies of education trade unions that serve to illustrate these themes in action. The report concludes with a summary of key findings and offers a framework for reflecting on issues of education trade union renewal and transformation.

Throughout the report we typically refer to 'teachers and other education personnel' when discussing union members and others working in educational institutions. We recognise the very wide range of roles undertaken by those who belong to ETUCE member organisations, and the different education sectors they work in. We hope that this choice of wording will reflect the diversity of these contexts and experiences. Where references are to specific roles, such as 'teacher' or 'researcher', it is because these particular occupational groups are being referred to.
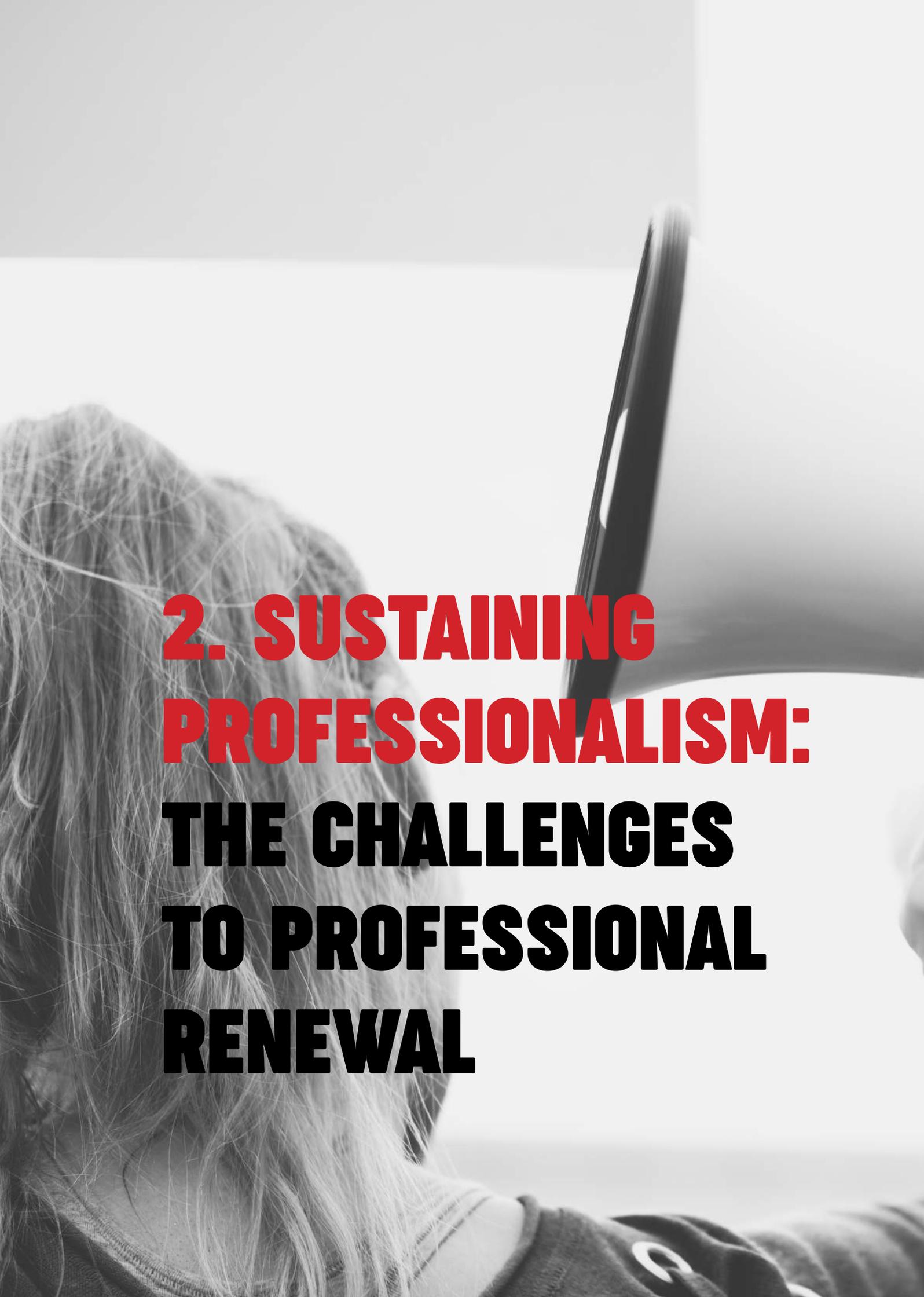
2. SUSTAINING PROFESSIONALISM: THE CHALLENGES TO PROFESSIONAL RENEWAL

Quality inclusive lifelong education and training is an important policy goal for international policymakers (The Council of the European Union, 2018; OECD, 2009; UNESCO, 2020a; World Bank, 2019). Although a national competence, European Union (EU) multilateral agreements, programmes and recommendations have repeatedly underlined the significance of quality of provision at Member State level to meeting the future socio-economic, demographic, environmental and technological challenges faced by Europe and its citizens (for instance, Council of the European Communities/Commission of the European Communities, 1992; Council of the European Union, 2009; European Commission, 2012a; 2012b; 2013; 2017; 2019a; European Parliament and the Council of the European Union, 2009). By comparison, the World Bank (2019) emphasises the critical role of quality learning outside compulsory education (early childhood education, tertiary and adult) in promoting equal opportunities and meeting the skills sought by future labour markets.

Within this quality discourse, the education professions and, crucially, their own lifelong learning occupy a central role (European Commission, 2019a; OECD, 2019a, 2020a; UNESCO, 2015). Yet, while initiatives to improve the quality of teachers and other education personnel, and their professional practice, have been at the forefront of national and international debates, the quality of their working lives have not received the same degree of policy focus. This is despite the increasing demands placed on those who work in educational institutions and the complexity, uncertainty and precarity of the world in which public education systems operate and evolve (European Commission, 2019a; OECD, 2019a, 2020a; UNESCO, 2019). Moreover, as governments face continuing problems of supply and demand at all education levels, the lack of attention to job quality and working conditions is not only harmful to the renewal and long-term sustainability of education professions but, given the indivisibility of industrial and professional issues (Bascia and Stevenson, 2017; Stevenson et al., 2018), threatens to undermine professionalism and the overall vision of a quality education for all (European Commission, 2020; United Nations, 2020a).

2.1 WORKERS AND WORK IN CRISIS

The 2008 global financial crisis and subsequent economic recession had an unprecedented impact on workers and working life. Unemployment hit record levels with an estimated 34 million job losses worldwide by 2010 (IMF, 2010). In the European Union, unemployment rose from a low of 7.2% in 2008 to a high of 11.4% in 2013, a level not seen in two decades (Eurostat, 2020a)[1]. Significantly, there was considerable variation at the national level with Latvia (+9.8 p.p.), Estonia, Lithuania (both +8.0 p.p.), Spain (+6.6 p.p.) and Ireland (+5.8 p.p.) most impacted between 2008 and 2009 and Cyprus (+12.2 p.p.) and Greece (+19.7

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1   Unemployment as a percentage of the active population aged 15 to 74.

p.p.) between 2008 and 2013 (Eurostat, 2020b). Eastern Europe and Central Asia were most affected by the global crisis[2] with only Kazakhstan avoiding an increase in unemployment rates. By 2011, unemployment remained high, particularly in the Western Balkans (Koettl et al., 2011).

Labour market responses to the crisis were equally heterogeneous, however, wage deceleration and freezes became the two most common employer actions in the European Union, especially in the public sector (ECB, 2012; Vandekerckhove et al., 2013). In certain Member States, changes to national legislation on employment protection and the flexibilisation of employment conditions led to a growth in part-time and involuntary part-time employment and, in the early years of the crisis, a reduction in working hours and opportunities for professional development. Resultantly, employees experienced increasing job insecurity, declining job satisfaction and deteriorating working conditions and, in the countries hardest hit, a decline in work-life balance (Eichhorst et al., 2010; Van Guyes and Szekér, 2013).

The financial crisis was described as 'a moment of transformation' for Europe (European Commission, 2010a). However, in the immediate aftermath, EU institutions prioritised economic policy coordination in the eurozone (European Commission, 2009). In 2010, with the launch of the Europe 2020 strategy, promoting 'smart, sustainable and inclusive growth', and 'An Agenda for New Jobs and Skills', EU policymakers expressed a greater commitment to job quality and working conditions, including efforts to address youth unemployment, gender inequality and the ageing population. By increasing education and training opportunities and strengthening the capacity of social partners and social dialogue at all levels, workers would be empowered to adapt to fluctuations in the labour market (European Commission, 2010a). Still, for certain analysts, the opportunity to promote better work was not fully exploited:

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A crisis can be a period which stimulates people to reconsider traditional positions and strategies. It can also create an environment for radical innovations. The challenge to improve quality of work as one of the ways out of the crisis appears to remain' (Van Guyes and Szekér, 2013, p.67).

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2   The global GDP contracted by about 2.2% whereas the ECA region average was 5%.

2.2 A CRISIS OF PUBLIC EDUCATION

High quality public education and training is considered central to the long-term economic growth, productivity and competitiveness of the European Union. Yet, as the European Commission implemented measures to stabilise debt and consolidate fiscal deficits across the region, public sector spending on education in many Member States was cut and/ or reprioritised towards other crisis-hit areas (European Commission/EACEA/Eurydice, 2013a). Overall, at EU28 level[3], public expenditure on education as a percentage of GDP rose from 4.8% in 2007 to 5.0% in 2013 but then fell to 4.7% by 2018. Educational expenditure as a percentage of total general government expenditure also decreased from 10.8% in 2007 to 10.2% in 2018 (Eurostat, 2020c). However, these aggregate figures mask huge disparities in economic growth at the level of the Member State, particularly during the immediate post-crisis period. For while GDP remained relatively stable across the EU28 in 2008, all but one Member State had experienced negative GDP growth by 2009. Furthermore, acknowledging that governments set budgets in advance, twenty-four Member States had already started to decrease educational spending as a percentage of total general government expenditure in 2008 and/or 2009. Of these, seven continued to make cuts in 2010 and ten made further cuts in 2011 (Stevenson et al., 2017). By 2018, educational expenditure as a percentage of total general government expenditure had not returned to pre-crisis levels for the EU28 and sixteen Member States (Czechia, Estonia, Spain, France, Italy, Cyprus, Latvia, Lithuania, Luxembourg, Poland, Portugal, Romania, Slovenia, Slovakia, Finland and United Kingdom) (Eurostat, 2020c). In higher education, specifically, nine European countries reduced funding for universities between 2008 and 2018 despite overall positive GDP, while six (Estonia, Italy, Lithuania, Serbia, Spain and the United Kingdom) accumulated large funding gaps (Pruvot et al., 2020).

Outside the EU, certain Eastern European and Central Asian countries[4] (for instance, Kyrgyzstan, Tajikistan) had experienced real terms growth in educational expenditure between 1999 and 2008. However, in Central Asia as a whole, educational expenditure as a percentage of GDP had declined (from 4.0% in 1999 to 3.2% in 2008).

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3   EU28 from 2013 to 2020. Croatia joined the EU in 2013 and the UK left the EU in 2020.
4   Central Asia includes Armenia, Azerbaijan, Georgia, Kazakhstan, Kyrgyzstan, Mongolia, Tajikistan, Turkmenistan and Uzbekistan (UNESCO, 2011).

2.3 CHALLENGES TO THE WORK OF TEACHERS AND OTHER EDUCATION PERSONNEL: INDUSTRIAL AND PROFESSIONAL

In 2016, the OECD average for staff compensation as a percentage of total public expenditure on primary, secondary and post-secondary non-tertiary education was 80%. Teacher compensation ranged from 45% in Czechia to 92% in Greece (OECD, 2019b). Thus, in the post-crisis period, teachers and other education personnel predictably bore the brunt of national austerity measures. In most EU Member States, school teachers' salaries were cut or frozen in both 2011/2012 and 2012/2013 (European Commission/EACEA/Eurydice, 2013b). Although there was a statutory salary increase in most EU countries in 2017/2018, this was generally index-linked to inflation or the cost of living. Notably, the real terms salaries of beginning teachers were lower than pre-crisis levels in nine countries (European Commission/EACEA/Eurydice, 2019). Higher salaries are considered to have a positive impact on the recruitment and retention of appropriately qualified teachers therefore current teacher pay levels could affect the comparative prestige of the profession and future teacher supply (European Commission, 2019a, European Commission/EACEA/Eurydice, 2019; OECD, 2019a, 2020a). This issue is of particular concern in the technical and vocational education and training (TVET) sector where cuts in teachers' and trainers' salaries and lower occupational status make it difficult to attract potential candidates from industry into the profession (CEDEFOP, 2020; Pilz, 2017). In higher education, salary cuts or freezes were most visible in Estonia, Greece, Ireland, Portugal and Latvia (EUA, 2011).

While pay has decreased, the workloads of teachers and other education personnel have increased (ETUCE, 2018; European Commission, 2019). For school teachers, work intensification can be linked to recruitment freezes and the reduction in support staff. In the 2018 Teaching and Learning International Survey (TALIS)[5], two key priorities for teachers and leaders were the recruitment of more teachers (particularly of certain subject specialisms and to certain geographical areas) and more support personnel. Indeed, many leaders felt that the shortage of support staff and teachers with expertise in special educational needs was an impediment to quality instruction. TVET experienced similar recruitment issues with teacher and trainer shortages prevalent in Portugal, Belgium (Flemish community),

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5   TALIS covers teachers and leaders in lower-secondary schools (ISCED level 2) in 48 countries/economies and one sub-national entity (Belgium, Flemish-speaking), primary teachers and leaders (ISCED level 1) in 15 countries/economies and upper-secondary teachers and leaders (ISCED level 3) in 11 countries/economies.

Italy and Denmark (OECD, 2019a). In higher education, academics were likewise affected through recruitment freezes or redundancies, while reduced teaching budgets led to the closure of programmes (UK), smaller departments (Estonia, Spain), or the merger of universities or departments (Denmark, Latvia). While some governments protected research funding, others targeted it towards national priorities, thereby limiting university autonomy and removing financial support for certain fields (e.g. arts, social sciences and humanities) (EUA, 2011). Since 2008, the rise in precarious employment and increased competition for senior and permanent positions (ETUCE, 2018) has had a particularly acute impact on women, already underrepresented in high-ranking academic positions (Clarke, 2015). More recently, performance-based funding allocation models for research and teaching have emerged in at least nine systems (Pruvot et al., 2020).

Yet, the industrial challenges facing teachers and other education personnel are inherently linked to wider professional challenges and the changing educational landscape in which they work (Bascia and Stevenson, 2017). Since 2008, workplace trends such as digitalisation, geopolitical events such as the European migrant crisis and increased socio-economic inequalities within school communities have all placed considerable pressure on the knowledge and skills of teachers and other education personnel. In the 2018 TALIS, teachers highlighted their need for more training in information and communication technologies (ICT), teaching in multicultural and/or multilingual settings, and teaching students with special educational needs. Even so, industrial and professional issues often inhibited teachers' opportunities to improve their practice; many reported a lack of time and incentives (accreditation, increased pay or career progression) to train (OECD, 2019a).

European teachers who reported a need for professional development in ICT ranged from 5% in England to 33% in Georgia. This might be related to practitioners' level of use; while 90% of teachers in Denmark claimed to use ICT regularly, only 29% of Belgian teachers did (OECD, 2019a). However, given the increased demands for online teaching during the Covid-19 pandemic, these figures are likely to change. Importantly, this professional issue has emerged from an intrinsically industrial concern; digital pedagogies, while not a traditional component of initial education or continuing professional development courses, have become ever more necessary given the serious health implications of face-to-face teaching. Similarly, the Bruges Communiqué and the Riga conclusions put the initial and continuing professional development of TVET teachers and trainers high on the EU policy agenda (European Commission, 2010b; European Commission, 2015). Yet, despite the importance of TVET to shaping the labour market relevance of learning and providing quick and appropriate responses to crises and their emerging demographic, socio-economic and technological needs, this has not been sufficiently recognised in national policy and there remains considerable variation in CPD requirements, regulation, provision and monitoring between countries (CEDEFOP, 2016). Again, a shift may occur in the post-COVID world.

The above represent only a proportion of the wide range of industrial and professional challenges faced by teachers and other education personnel. In our own research, we surveyed the ETUCE affiliates on these challenges and the perceived level of importance to their members (see diagram 1). Notably, three industrial issues were the highest priority: pay (71%), workload in terms of administration and bureaucracy (70%), and workload in terms of class size and contact time (66%). Pensions (46%) and health and safety (45%) were fourth and fifth respectively. However, when percentages for priority or high priority

issues were combined, professional autonomy (79%), inclusion of students with additional needs (70%), access to professional development/professional learning systems (68%), academic freedom (67%) and digitalisation (67%) featured highly. In the coming months and years, as we emerge from the pandemic, it is likely that other issues will come to the fore.

2.4 CHALLENGES TO DEMOCRATIC RENEWAL

The social injustices faced by black people in our societies have recently received increased policy attention (European Parliament, 2020; United Nations, 2020b). In our survey, 61% of trade union respondents felt inequality and discrimination were a high priority or a priority for their membership. However, the survey item is broad and makes no reference to specific marginalised communities. This is a cause for concern as workplace inequalities and discrimination are not experienced in the same manner by all communities. Similarly, in education, international policymakers have highlighted migrants, refugees and children with special educational needs as challenges for inclusive classrooms, yet little attention has been paid to the wider diversities of pupil populations. Moreover, 95% of school leaders believe that pupils should learn about people from different cultures (OECD, 2019a); however, there is limited data on the extent of diversity within the education professions beyond binary descriptions of participants' age, experience and gender. The absence of and limited consideration for diversity within educational research perpetuates the social injustices endemic in our school systems and societies. If the education professions are to renew, it is important they reflect the communities they teach.

Figure 1. Education trade union industrial and professional issues and the level of importance to their members.

■ High priority %   ■ Priority %   ■ Low priority %   ■ Not a priority %

Issue	High priority %	Priority %	Low priority %	Not a priority %
Digitalisation in education	31.6%	35.1%	26.3%	7.0%
Inclusion of students with additional needs	33.3%	36.8%	21.1%	8.8%
Unemployment/redundancy/job loss	25.9%	25.9%	33.3%	14.8%
Precarious work/casualised contracts	35.6%	27.1%	22.0%	15.3%
Work-related social security provision	30.4%	23.2%	33.9%	12.5%
Access to professional development/professional learning systems	30.4%	37.5%	23.2%	8.9%
Health and Safety	44.6%	35.7%	12.5%	7.1%
Equalities issues/discrimination	25.0%	35.7%	28.6%	10.7%
Professional autonomy	38.6%	40.4%	17.5%	3.5%
Pensions	45.6%	31.6%	14.0%	8.8%
Workload (administration and bureaucracy)	69.5%	18.6%	5.1%	6.8%
Workload (class size and contact hours)	65.6%	26.2%	4.9%	3.3%
Pay inequalities/pay gaps (based on gender, disability etc)	34.5%	22.4%	19.0%	24.1%
Meeting needs of migrant students	10.7%	48.2%	19.6%	21.4%
Environmental education/climate emergency	5.4%	46.4%	33.9%	14.3%
Academic freedom	29.3%	37.9%	17.2%	15.5%
Pay/Salary	70.7%	20.7%	5.2%	3.4%
Performance management/accountability measures	15.8%	40.4%	29.8%	14.0%
Curriculum issues	29.8%	31.6%	26.3%	12.3%

Recognising, celebrating and encouraging diversity in educational employment settings might be linked to national recruitment and retention strategies. In the next five to ten years, many teachers and trainers in school education and TVET are likely to retire. To replace this ageing workforce, policy attention has turned to raising the attractiveness of the education professions. Yet, teachers and trainers in this sector lack the professional status and social recognition of equally qualified workers (CEDEFOP, 2020; OECD, 2019a, 2020a). Although the majority of the 2018 TALIS teachers were satisfied with their career choice, 26% felt undervalued by society. Moreover, the longer teachers spent in the profession, the more disillusioned they became. While governments have tended to focus disproportionately on recruitment rather than retention strategies, teachers do leave the profession early and for a variety of reasons, not least wellbeing. Certainly, the lack of mentorship and induction for new entrants, limited career opportunities and the increased workload and use of temporary contracts at the institutional level could explain some level of practitioner dissatisfaction, stress and burnout. However, policy-level interventions which prescribe pedagogies and restrict professional autonomy are just as significant (OECD, 2019a, 2020a).

2.5 THE FUTURE OF WORK IN TIMES OF CRISIS

In April 2019, at a high-level conference entitled 'The Future of Work: Today, Tomorrow, For All', hosted by the European Commission, discussions centred on digitalisation, globalisation, migration, demography and climate. With the European Pillar of Social Rights (European Commission, 2017) as a source of inspiration, delegates spoke positively about the need for better labour market policies (European Commission, 2019b). There was no discussion of a pandemic. While focusing on the challenges which can be anticipated and predicted, policymakers seemingly forget to plan for the unknowable. So, how might teachers and other education personnel prepare for such uncertainties in the future?

For some, the crisis is not a moment to adapt but an opportunity to shape the world for the better (Sobe, 2020). Certainly, there is a new appreciation of the labour of teachers and other education personnel (UNESCO, 2020b). But attempts to build back better through professional renewal are now hindered by the continued uncertainty of the pandemic, its impact on the labour market and the very real possibility of the greatest economic crisis for a century (OECD, 2020b). As this report is being written, recruitment freezes, the termination of fixed-term contracts and redundancies have already been experienced in higher education in Europe, and there is a fear of further job cuts as a result of lost income from the international student market (ETUCE, 2020). Even with the partial or full reopening of institutions, the work and working conditions of teachers and other education personnel are likely to be affected well into the future and the wider socio-economic crisis will no doubt have ramifications for the issues they face in their virtual or physical classrooms. Moreover, future crises - health, humanitarian, geopolitical, climate - could yet impact the sector. In the context of such uncertainty, the work of education trade unions has never been more vital in shaping the future of education in Europe for students, teachers and other education personnel.

3. THE CHALLENGES FACING EDUCATION TRADE UNIONS

Much of the focus in this report relates to developments outlined in the previous section and future possibilities for the education trade union movement in Europe. There is therefore a particular concern with developments in the last decade, and the period since the 2008 economic crisis. However, it is important to recognise that many of the trends we discuss are not novel to the period since 2008, but were already well established and have simply been accelerated by the crisis. In the post-war period trade unions in Western Europe had not only secured significant gains in living conditions (through welfare state expansion and the development of social security systems) but had also won important institutional supports to strengthen their role in social dialogue and collective bargaining. However, signs that the substantial gains made by organised labour in Western Europe had been thrown into reverse have now been visible for several decades. It is for example more than 40 years since the European historian Eric Hobsbawm questioned whether the forward march of labour had been halted (Hobsbawm, 1978, published in 1981).

Traditional indicators of trade union influence are membership levels, density rates (% of potential members in union membership) and bargaining coverage. Measuring any of these factors presents methodological difficulties, especially when comparisons are being made between countries and over time. However, with this caveat in mind, when assessing the experience of the general trade union movement all of these indicators point to a long-term trend of declining trade union strength (Bernaciak et al., 2014).

In this section we discuss some of the trends in European industrial relations and identify particular challenges that confront both trade unions generally and education trade unions particularly. Our approach is shaped by the need to understand the contextual specificities shaped by geography and to distinguish between short term developments and longer-term trends over time. In discussing these issues we draw extensively on Kurt Vandaele's (2019) analysis published by the European Trade Union Institute, *Bleak Prospects: Mapping trade union membership in Europe since 2000* as the most recent and comprehensive analysis of these issues. This data provides a contextual background that we supplement by drawing on the project survey.

3.1 TRADE UNION TRENDS:
MEMBERSHIP, DENSITY AND ENGAGEMENT

The beginning of the general decline in trade union membership can be traced back to the early 1980s when the social-democratic Keynesian consensus in Western Europe collapsed and what has become known as neoliberalism (Harvey, 2005) began to emerge as a new orthodoxy. In the UK for example, where the country has been in the vanguard of adopting classic neoliberal policies, trade union membership declined by nearly 50% between 1980 and 2016, although membership has shown increases in each of the last three years (TUC 2020). However, even in countries where the policy trajectory has been rather different there is still evidence of dramatic membership declines since the early 1990s including, for example, in France and Germany. Between 2000 and 2016 trade union membership in 20 European Countries declined from 40.2 million to 36.1 million (10.1%) with the rate of decline increasing significantly in the second half of that time period (the years following the economic crisis) (Vandaelle, 2019, p. 9). Although the general pattern is one of decreasing membership it is important to recognise that patterns have not been even across countries. In a study of 32 countries between 2000 and 2017 Spain, France, Luxembourg, Malta, Norway, Italy and Iceland demonstrated growth in the latter part of that period with Switzerland, Denmark, Sweden and Finland showing only modest decline (Vandaelle, 2019, pp. 11-12). By far the most dramatic decreases have been in Eastern European economies (Visser, 2019). Among the 32 European countries in the study Vandaelle reports all 11 Eastern European countries registered sharper declines than any other countries in the survey - in excess of 30% in seven of those countries (Czechia, Latvia, Slovenia, Romania, Hungary, Estonia and Slovakia). Vandaelle argues that decline was inevitable following the removal of compulsory union membership during the Soviet era, however 'this trend was not reversed but continues today' (2019, p. 12).

Data relating to union density levels in Europe show similar trends over time, but also highlights the significant disparities between countries. Generally speaking, union density declined steadily and continuously between 2000 and 2016 with a union density of 27.8% at the start of the millennium falling to 21.4% in 2016 (Vandaelle, 2019, p. 17). In some countries union membership increased in this period but because of increases in the numbers employed density rates still declined. Union density rates between different countries are stark and once again highlight the very specific problems faced by several Central and Eastern European economies (Visser, 2019). In 2017 Iceland had the highest density at 90% but 16 countries had density levels below 20% and Estonia was the lowest at 4% (Vandaelle, 2019, p. 17).

In this report we do not engage directly in analysing the membership figures of individual education trade unions or seek to establish density levels in different countries. Such data has numerous problems associated with it, not least is that membership figures can be calculated in quite different ways making meaningful comparative work difficult. The European Commission's own data relating to membership, density and bargaining coverage, is published in the Eurofound 'Representativeness' studies with the last report for education published in 2011 (Eurofound, 2011) and the next study due in October 2020. These studies highlight the very considerable methodological problems of making meaningful comparisons across all of the relevant indicators. In this report, based on studies such as Eurofound (2011) and Vandaele (2019), we take for granted that education trade unions have relatively high membership and density levels when compared to other employment sectors and that education trade unions have typically not experienced the types of membership decline that are common in private sector unions. Rather our focus has been to identify the areas of growth and decline in education trade union membership and to better understand the extent to which those who are union members actively participate in their organisations.

In the project survey participants were asked to identify (by providing open text responses) areas of growth or decline in membership and to indicate different types of worker or different sectors where trends were evident. The survey was completed by 62 ETUCE member organisations (response rate equal to 47%) and a full list of participating unions is provided in Appendix 2. Respondents were not asked directly to indicate if membership was increasing or decreasing, although of those that mentioned this indirectly roughly equal numbers suggested their union was experiencing either rising or falling membership.

For several unions trends in growth or decline were linked to wider developments in particular educational sectors. Recruiting members in new or expanding sectors was the most frequently cited source of growth (identified by 14 respondents), with growth in the early childhood education sector identified by several unions. In some cases an expanding sector naturally created growth opportunities but in other cases unions had been able to secure contract gains in particular sectors and this had gained members. For those unions who recruit across all phases of education higher education and research was identified as the area where density levels were typically lowest and recruitment was most challenging.

The most complex areas for recruitment were those relating to younger members and precarious workers. These problems are amplified because they often co-exist - precarious work is disproportionately experienced by new entrants to the labour market/profession and these are typically younger workers (Berry and McDaniel, 2018). When indicating areas of decline the difficulties encountered recruiting younger members were identified 16 times in open text responses with precarious workers identified by nine respondents. However, these two factors were also frequently cited as areas of growth (the second and third most commonly cited after factors relating to specific sectors). That these groups of workers are cited as sources of both decline and growth highlights the increasing volatility and unpredictability of trade union membership, affirming that membership cannot be assumed in a way that it might have been in the past. This was recognised by several survey respondents who pointed out that recruiting young workers required an increas-

ingly strategic approach. One aspect is this was a deliberate focus on building relations with student unions and training teachers. The Education and Science Employees' Union of Russia (ESEUR) for example had experienced significant success with this approach.

Several explanations were offered where problems were faced. The deep penetration of anti-union ideas was identified by a small number of respondents – 'trade unions are seen as a negative relic of old social thinking and as an obstacle to progress and prosperity' with negative media images cited as a particular problem. However, it was also acknowledged that unions had not always been able to demonstrate their utility or value to younger workers. One respondent indicated that unions had focused on protecting the interests of existing members, while neglecting the specific challenges faced by younger members of the profession. Indeed, one consequence of prioritising current members had been to shift the costs of austerity on to new and young workers in a way that presented trade unions as part of the problem rather than being seen as the solution.

Similar issues apply to precarious workers, and as has been indicated, precarious workers are more likely to be young. Indeed, precarious work reflects all the key cleavages of the labour market and so precarious workers are also more likely to be women, black and/ or disabled (see research into higher education reported by UCU, 2019). By their nature, with their fragile connection to work, and the tendency to have to move frequently to find work, precarious workers pose specific challenges for union organising (Simms, Holgate and Hodder, 2018).

In this report we include two case studies that illustrate particular initiatives to recruit and organise young members and precarious workers respectively (ZNP in Poland and FLC CGIL in Italy).

Other issues identified as posing recruitment challenges by a small number of respondents included system fragmentation (often linked to privatisation trends), the negative consequences of competitive unionism and in some cases the growth of managerial intimidation – the notion that union membership, and certainly union activism, may be viewed as prejudicial to career progress.

The data presented above points to the increased challenge of recruitment and therefore the need to approach the issue strategically. We were interested to what extent, and in what ways, education trade unions regularly discuss membership issues, or develop strategic membership campaigns. Survey data indicated that a clear majority (84%) of unions have regular discussions about recruitment and membership issues at national executive/board level although the number of unions who engage in more detailed discussion about these issues, or who have corresponding discussions at a local level is much lower (see Table 1). For example, 60% of respondents have 'detailed discussions' in a dedicated sub-committee while just over half (53%) have recruitment plans at a local level. Interview evidence from case study unions pointed to the importance of this type of work and the value of detailed membership data but it was recognised that using data in this way had resource implications and sometimes generated discomfort in some unions.

Table 1: Education trade unions membership recruitment monitoring

	Yes (%)	No (%)
There is regular discussion of membership issues at national executive/board level	84	16
There is a strategic plan for recruitment	63	37
There are quantified recruitment targets	38	62
There is detailed monitoring of membership levels by a specialist (sub-) group	60	40
There are recruitment plans at the level of the local union branch	53	47

In presenting this discussion about membership we are keen to emphasise that membership can only be one indicator of trade union capacity, and that a key priority has to be ensure members are engaged with the union and participate in its activities. Indeed, we would argue that a narrow focus on membership risks only paying attention to what is often the last indicator to show signs of decline. A shrinking and ageing activist base often provides an early warning system of problems ahead, but only if unions are aware of these issues and willing to face up to them. In Table 2 we provide responses to survey questions that focused on members' participation in several key aspects of union activity.

Table 2: Education trade unions and membership participation

	Not relevant (%)	Decreasing (%)	Stable (%)	Increasing (%)
Voting in union elections	8	16	52	24
Attendance at local [branch] meetings	2	33	46	19
Attendance at national policy conferences	7	11	63	19
Members acting as local union officers	3	24	54	19
Members acting as workplace representatives	0	26	56	18
Members standing for election to union office	3	22	62	13
Members participating in union campaigns	2	24	52	22
Members participating in union actions (for example strikes)	13	30	35	22

Although several open text responses made reference to difficulties engaging members, and, for example, challenges recruiting workplace representatives, the data does not unambiguously point to significant problems. At least half of respondents described member participation as broadly stable with declining trends more common than positive ones, but not substantially so. For example, 26% of respondents indicated it was becoming more difficult to recruit workplace representatives, but 18% indicated an increase in members being willing to take on this role (see the case studies of Lärarförbundet and UCU in this report for two examples of how unions have sought to develop the role of workplace representatives). Of some concern might be data that points to an increasing gap between activist endeavour in the union and a wider, and more passive, membership. For example the number of respondents reporting diminishing interest in attending policy conferences (largely activists) is quite low (11%), but those reporting a decline in members willing to attend branch meetings is much higher (33%). Exploring ways in which unions can bridge the gap between an activist class and the union's wider membership may become an increasingly important issue in the future.

One clear indication of union members' participation in union activity is members' involvement in industrial action. One obvious feature of general union decline has been a reduction in the volume of industrial action which can be described as a long-term trend, albeit with considerable variation between countries (Vandaelle, 2016). In the immediate years after the economic crisis there was something of a spike in industrial action, especially in public sectors, as a form of shock reaction to deep cuts. Since then industrial action has decreased as weak labour markets have made action more difficult. However, although strike action has typically declined there is evidence that trade unions have broadened their repertoire of actions and often adopted more creative tactics to win support for their campaigns. Examples include actions involving coalitions of trade unions and others, such as service users, combined with increasingly sophisticated social media campaigns (Ibsen and Tapia, 2017).

Once again, education trade unions appear to have been less impacted by these issues when compared to the wider trade union movement. Although education trade unions are not completely insulated from wider trends it is the case that education trade unions, in particular circumstances, are clearly able to mobilise significant industrial action. Perhaps the clearest European example took place in Denmark in 2013 when an employer lock out resulted in 930,300 'lost work days' (the most common way of calculating the effect of strikes and lock outs) compared to 10,200 lost days across the whole economy the previous year (Stevenson, 2019). These trends are further illustrated in 2018 when the UK reported the sixth lowest number of 'days lost' in a year since 1891, and the lowest figure for the public sector since separate records began. However, in that year industrial action by education trade unions accounted for 66% of all days lost across the economy (ONS, 2018). These trends also include Eastern Europe with recent evidence of industrial action across almost all of the EU's eastern European economies including Hungary 2016, Slovenia 2018 and Czechia, Lithuania and Poland in 2019 (the latter example being a national strike of 19 days). On the data available we are by no means claiming a major 'turnaround' in the long term trends relating to industrial action but rather we argue that in recent years there have clearly been signs that education workers have become frustrated by the long term impacts of austerity and they have shown their willingness to organise collectively to challenge this. Moreover, this is not only a European phenomenon, but such trends are visible

globally (see, for example, Blanc's (2019) account of the #RedforEd strikes in the USA). In the survey 22% of respondents indicated that members had demonstrated an increased preparedness to take action such as strike action.

3.2 SOCIAL DIALOGUE AND COLLECTIVE BARGAINING: COVERAGE AND QUALITY

In addition to membership levels and density researchers often present collective bargaining coverage (expressed as a percentage of the workforce covered by a collective agreement) as an indicator of trade union effectiveness. On this issue, in the general economy, the differences between public sector and private sector experiences are often stark with bargaining coverage in the private sector shrinking significantly in many countries. The picture is also more complex because institutional arrangements can mean that membership and density levels are not always closely related. For example, in general terms the Nordic countries have high levels of density, accompanied by high levels of bargaining coverage whereas Southern European countries (France, Spain, Italy, Portugal and Greece) have bargaining coverage levels that far exceed union density levels. France poses the issues most sharply with density levels across the whole economy of 11% between 2010 and 2016 being translated into bargaining coverage of 98% (Vandaelle, 2019 p. 21).

In the education sector bargaining coverage is assessed periodically through the Eurofound 'Representativeness' studies (2011 and 2020 forthcoming). These studies highlight that bargaining coverage is typically high in education sectors as national arrangements predominate and collective agreements secured with trade unions commonly apply to the whole workforce. In this study our approach has not been to focus on bargaining coverage *per se*, but to establish to what extent education trade unions express satisfaction or otherwise with social dialogue arrangements. For the purpose of this study we have used the European Commission's own framework of social dialogue that includes four different elements:

- Joint working/projects with employers
- Information sharing/communication
- Consultation
- Negotiation/collective bargaining

In the European Union's founding treaties it is important to note that 'social dialogue' has a particular status with a clear commitment to involving employers' organisations and trade unions, sometimes alongside governments, in discussions on relevant matters. Within the project we note that some trade unions expressed concern that the distinctive nature of social dialogue (as a relationship between employers and organised workers) was being eroded as social dialogue was sometimes being presented as 'consultation with stakeholders' involving social partners and a diverse range of other civil society organisations. This reflects research findings from elsewhere (Stevenson et al., 2019) and a concern that social dialogue is being undermined through a process of dilution. This is clearly an issue that requires some vigilance on the part of education trade unions.

In using the framework above we recognise our analysis is 'broad brush' and, for example, we were unable to explore experiences of social dialogue at different levels (national, regional, institutional) and these differences can be significant. We are also not suggesting that the four elements identified above are equivalences. Negotiation for example is a quite different process to the other three elements and the different power relations embedded within each of them are hugely significant. We are very clear that although all forms of social dialogue are important the extent to which meaningful collective bargaining exists must be considered the benchmark when evaluating the efficacy of social dialogue arrangements.

Within the survey respondents were asked to indicate levels of satisfaction with social dialogue on both traditional employment matters and on questions of wider education policy. In relation to employment matters there was a roughly even balance between those who considered the quality of social dialogue to be either unsatisfactory or satisfactory (see Table 3). Across all four elements a significant proportion of respondents identified social dialogue as 'good' (29% in relation to both consultation and negotiation). However, on the key indicator of collective bargaining it is important to recognise that 39% of respondents describe this as 'unsatisfactory'.

Table 3: Education trade unions' assessment of social dialogue in relation to employment matters

	Unsatisfactory (%)	Satisfactory (%)	Good (%)
Joint working/projects with employers	41	37	22
Information sharing/communication	32	43	25
Consultation	34	37	29
Negotiation/collective bargaining	39	32	29

When analysing the results by region some stark differences begin to emerge, even taking account of the small number of unions within each group (the basis for regional allocations is described in Appendix 1). For example, four of the eight Northern European respondents indicated social dialogue was 'good' across all four elements, whereas Southern European education trade unions indicate very high levels of dissatisfaction (thirteen

out of 16 Southern European respondents described both consultation and negotiation as 'unsatisfactory'). The following comment is from a Spanish trade union official but similar remarks were recorded from France, Italy. Portugal and Greece:

> **"**
>
> *In this country social dialogue has deteriorated badly. Unions are not taken into account and are neither negotiated with nor consulted. Everything is imposed without dialogue. Throughout these pandemic months, we have not been called to sectoral meetings or, if we have, it has been to notify us of decisions already taken without trade union involvement.*

Results from Central Europe and Eastern European trade unions are more mixed with majority responses indicating social dialogue was broadly satisfactory (50% of 20 Eastern European respondents and fractionally less than half of unions in Central Europe). Education trade unions in the UK diverged sharply between those unions dealing with UK wide/ English employers and those dealing with the Scottish government.

It is interesting to note that when the same question is asked in relation to educational policy and professional issues that experiences become more divergent (Table 4). A broadly higher rate of respondents identify social dialogue in these areas as 'good' (typically around 30% across the four elements). However, in relation to collaborative working on professional issues only 22% describe this as 'good' whereas more than half (52%) describe their experience as 'unsatisfactory'. Again, although a majority identify their experience on these issues as either 'satisfactory' or 'good' a very substantial minority across all areas describe their experience as 'unsatisfactory'. Here we reiterate that such policy issues are of great importance in terms of providing high quality public education, but these issues also have a profound impact on the experience of work in terms of workload, autonomy and job satisfaction. Professional and industrial issues are intimately connected.

Table 4: Education trade unions' assessment of social dialogue in relation to education policy matters and professional issues

	Unsatisfactory (%)	Satisfactory (%)	Good (%)
Joint working/projects with employers	52	25	23
Information sharing/ communication	38	30	32
Consultation	37	33	30
Negotiation/collective bargaining	45	23	32

When inviting respondents to assess their union's experiences of social dialogue in the decade since the economic crisis there is some evidence that points to improvements in social dialogue in the second half of the post-crisis decade. Notwithstanding that between 30-40% of respondents described social dialogue as 'unsatisfactory' it was the case that across all four elements those reporting an improvement in social dialogue increased when comparing the last five years against the last ten years. In the years immediately after the crisis Bach and Bordogna's (2013) analysis of industrial relations in 15 EU states led them to conclude that collective bargaining had been the *'victim of government policies in response to the crisis'* (p. 287). Evidence from this study does suggest, tentatively, that in the education sector the European Commission's (2016) aspirations for a 'new start' in social dialogue were beginning to be realised in some contexts. For example, in the survey 8 out of 10 Eastern European trade unions who are members of the European Union indicated social dialogue had improved in the last five years. However, set against this improvement is a corresponding, and indeed more dramatic, reversal of this trend when data for the last 12 months is considered. In Table 5 we present this data in relation to collective bargaining only, although a similar pattern is demonstrated across all four dimensions of social dialogue.

Table 5: Education trade unions' assessment of trends in collective bargaining

	Deteriorated (%)	No change (%)	Improved (%)
Last 10 years	36	38	26
Last 5 years	24	44	32
Last 12 months	37	48	15

It is not clear to what extent the deterioration may be attributed to the impact of the coronavirus pandemic. When asked specifically about coronavirus issues between 18% and 29% of respondents reported social dialogue was 'good' (depending on the element - see Table 6) although these numbers were exceeded by those indicating dissatisfaction. In this regard 42% and 47% reported dissatisfaction in relation to information sharing and consultation respectively with these figures increasing to 57% and 58% for collaborative working arrangements and collective bargaining.

Table 6: Education trade unions' assessment of social dialogue on Covid-19 related matters

	Unsatisfactory (%)	Satisfactory (%)	Good (%)
Joint working/projects with employers	57	25	18
Information sharing/communication	42	33	25
Consultation	48	23	29
Negotiation/collective bargaining	58	15	27

Regional differences in relation to the pandemic highlight some results that might have been anticipated, but also some surprises. For example, in countries where social dialogue is more robust education trade unions were more likely to describe their social dialogue experiences during the pandemic as positive. One union official from the Republic of Ireland commented *'Social dialogue is a long-established tradition in Irish education policy-making. The current crisis has strengthened that tradition across all education sectors'*, while a colleague from Norway observed *'social dialogue at the national level is good, and it has most likely become even stronger after the coronavirus'.* Similarly, but by contrast, the negative experiences of many Southern European trade unions were confirmed during the pandemic. However, for many Eastern European countries in the EU there were very high levels of dissatisfaction with social dialogue during the pandemic. Despite some positive indicators elsewhere in the survey - a clear majority of all 11 trade unions in this group expressed dissatisfaction with social dialogue arrangements relating to the pandemic across all four elements.

This survey of 62 education trade unions across the European region highlights the range of experiences of social dialogue across the education sector. Experiences are clearly diverse with some regions able to maintain relatively robust social dialogue arrangements despite the impact of the 2008 economic crisis. Experiences across Eastern Europe appear much more mixed within regions with some unions reporting improving relations while others express deep concerns. Across Southern Europe the situation appears grave. In some of these countries there have been some political developments that point to a more optimistic analysis but on the whole our survey points to an industrial relations landscape blighted by the crisis which has shown almost no signs of improvement.

3.3 RESPONDING TO DECLINE: IDENTIFYING TRADE UNION RESPONSES

The developments we have identified above have been visible for many years, and are evident across the trade union movement. It is inevitable therefore that trade unions will seek to respond in ways that can maintain their strength and influence. 'Union revitalisation' has become a term used to describe the strategic responses of trade unions to these developments and there is now considerable research that has been undertaken to identify the different approaches being adopted. For example, Frege and Kelly (2003) identified a number of different revitalisation strategies and these can be summarised as follows:

- The 'organising model' - places a relentless focus on building capacity at the base of the organisation and encourages members to act collectively to mobilise their resources of power and to bring about change. It is an approach that actively seeks to build worker commitment around a set of shared interests and mobilises collective action to defend and extend those interests.

- Strengthening social dialogue and labour-management partnerships - this approach seeks to work through collaborative arrangements with employers to achieve union objectives. Such an approach covers a wide range of practices which can comprise very different levels of co-operation and/or conflict.

- Political engagement - whereby unions focus on working with, and through, political institutions to achieve the changes they are seeking. Securing legislative change provides a clear example of this approach.

- Coalition building - in this instance trade unions seek to develop a broad range of alliances in order to increase their bargaining power in the employment and/or public sphere. This approach can involve building a narrow coalition around issues of immediate interest to the union or it may involve working with a wider range of allies and around a broader range concerns. The latter approach is often referred to as 'social movement unionism'.

- Restructuring and reorganisation - one response to the more hostile environment faced by unions is to reorganise. Mergers and amalgamations have become common in the general trade union movement but this approach also includes internal restructures. Restructures can focus on largely bureaucratic arrangements (staff structures for example) but can also extend to radical changes in governance arrangements and democratic structures.

- Developing international solidarity - recognising the transnational nature of modern production methods many unions have sought to connect with partner unions in different countries, but who work for the same employer, or are part of the same supply chains.

Clearly presenting strategies in this way is a heuristic device intended to help make sense of complex processes. Such strategies are not intended to suggest a set of discrete approaches to union revitalisation and it is important to recognise that many may be pursued in combination.

Given that many of these strategies have been evident in trade union organisations for some time it becomes possible to draw some conclusions about the relative importance of these approaches over time. One such analysis is provided by Ibsen and Tapia (2017) who undertook a comprehensive review of research into union revitalisation strategies in Europe and the USA/Australia to identify what strategies have been adopted most widely. They argue that despite historical and institutional differences 'trade unions in very different national contexts are converging towards similar strategies of revitalisation' (p. 171) with a clear focus on the organising model (see also Simms, 2015). Ibsen and Tapia argue that even in countries where social dialogue remains relatively robust the progressive erosion of social partnership has compelled unions in what they refer to as 'institutionally secure' countries to look to organising approaches to reassert their collective power and

to rebalance relations with employers. According to Ibsen and Tapia, Sweden, Denmark, Germany and the Netherlands all provide examples of how the organising model has been imported into contexts where partnership approaches have traditionally prevailed. As Ibsen (2015) argues, partnerships only function effectively for trade unions when they have established their credibility to represent their members' collective interests. There is therefore a recognition that whatever the revitalisation approach adopted the unifying theme is the need to actively build union power.

Within this study evidence from the project survey allows us to draw some conclusions about the extent to which education trade unions are pursuing the different strategies identified. Survey participants were invited to respond to a number of strategy statements that broadly correspond to five of the strategies identified by Frege and Kelly (2003) (the strategy relating to restructuring and reorganisation was treated separately as it required differently worded questions). Respondents were asked to indicate if the actions contained within the statements were high, medium or low priority (or not a priority at all) for their union. Data was analysed across six regions (see Appendix 1).

What emerged clearly is that *'improving collective bargaining'* is a core priority for the vast majority of trade unions - 89% of respondents indicated this was a high priority for their union. Regardless of whether collective bargaining is deemed to be working satisfactorily or not, the vast majority of unions place the highest priority on seeking to represent members' interests through collective bargaining mechanisms. This statement aligns with the strategy of strengthening labour-management relationships, but within this strategy commitments to other elements diverged considerably. *'Seeking partnership agreements with employers'* and *'seeking to work constructively with employers'* was typically a high priority for education trade unions in Central, Northern and Eastern European regions, but much less common in Southern Europe or the UK.

After seeking to improve collective bargaining the statement that received the most positive response was the commitment to *'develop union activity at workplace level'*. A total of 71% of respondents indicated this was a high priority for their organisation. It was also, after the commitment to collective bargaining, the only factor that scored evenly across all regions. While the data here has limitations it does suggest that a shift towards an 'organising model' in some form is not only becoming more common, but is also visible in very different contexts as per the conclusions presented by Ibsen and Tapia (2017). What is also important to note in relation to this strategy however is that although a commitment to developing workplace activity scores highly, other linked statements to this strategy (focused on identifying and developing workplace leaders) often scored appreciably lower. This may indicate that education trade unions aspire to develop workplace activity but are not putting in place the related strategies to help make this happen.

Data relating to strategies focused on constructing alliances, seeking influence through formal political processes and developing international solidarity was more mixed and often reflected significant regional differences. For example, education trade unions in Northern Europe placed limited emphasis on proposing legislation (only one union in eight indicated this was a high priority) as in this region non-legislative responses are often both preferred and possible. In those regions where collective bargaining was often considered poor then education trade unions were more likely to seek to mobilise political pressure,

and to seek alliances with others (within and beyond the education sector) in order to build political leverage. For example, 11 out of 12 education trade unions from Eastern Europe (and in the EU) indicated proposing legislation was a high priority and in Southern Europe 15 out of 18 education trade unions scored this statement in the same way. Overall, 62% of respondents rated proposing legislation as a high priority and 60% of unions gave a high priority to building public campaigns to increase political leverage. The extent to which education trade unions felt the need to work with others (trade unions and civil society organisations) highlighted some regional variation with education trade unions in Southern Europe and the UK most likely to seek to build these types of alliances. In many ways the data on alliance building reflects that reported in wider literature (Ibsen and Tapia, 2017). It is likely that a focus on this type of activity is increasing where social dialogue is poor and it remains to be seen if this strategy also becomes more common where social dialogue has historically been stronger, but may be weakening.

In this report the case studies provided by FE.CC.OO (Spain) and Acod Onderwijs (Belgium) offer interesting examples of how education trade unions are engaging in different types of alliance building.

In the survey we treated the sixth strategy identified by Frege and Kelly (trade union restructuring and reorganisation) separately simply because the wording of statements needed to capture past actions and future intentions (see Table 7). This strategy includes a range of actions from re-organising union structures (for staff and/or members) through to the possibility of amalgamations and mergers.

Table 7: Education trade unions' consideration of reorganisations, restructures and amalgamations/ mergers

	Yes (%)	No (%)
The union has (or is considering) significantly re-organising its structures	44	56
The union has undertaken (or is considering) significant internal re-organisation of officials/staff	43	57
The union has considered mergers or amalgamations (or recently merged/amalgamated)	26	74

Here the evidence suggests a significant number of organisations have either undertaken, or are considering, some appreciable organisational change. The nature of the data does not allow us to identify the detail of that and clearly a very wide range of responses can be captured by these answers. However, it does suggest that education trade unions are facing up to the need to work in different ways with 44% indicating they have had, or were considering, significant re-organisation of structures. It is unsurprising that consideration of amalgamation or merger is less common but it is perhaps significant that 26% of respondents indicated this was an issue that had been, or was being, contemplated.

3.6 EDUCATION TRADE UNIONS AND UNION RENEWAL

It is undoubtedly the case that education trade unions have not faced the same pressures as other trade unions to have to reassess their purpose and rebuild. Education trade unions represent predominantly public sector workers where social dialogue tends to be more robust and where union membership has been more resilient (Visser, 2019). There can therefore be a tendency to dismiss the need to confront change as education trade unions have seldom faced the types of immediate crisis that can make change unavoidable. Education trade unions are however by no means immune to the pressures that have eroded union influence described above, and there is no indication that any of the problems faced will automatically correct themselves or that future threats will not be realised.

The issues can be expressed simply – the problems facing education workers, and the education systems they work in, have been evident for many years and have been accelerated by the years of austerity. These problems are unlikely to ease, indeed they are likely to intensify unless there is a serious change in the direction of public policy. However, the capacity of education trade unions to resist these developments has proven limited. Collective bargaining arrangements have often been eroded and in many jurisdictions efforts to marginalise education trade unions have been direct and forceful. Our argument here is that reversal of this process is unlikely without a serious and sustained effort to (re-) build union organisation and to do so by drawing on the key, often untapped, resource that unions have – members and potential members. This is why education trade union renewal was recognised as a priority by ETUCE in its resolution *Shaping the Future of Europe: the role of education trade unions*[6] at its special conference in Athens in November 2018 and by Education International at its world congress in 2019 in Bangkok when it passed a resolution identifying union renewal as 'the new imperative'[7].

EI's Congress motion referred directly to research published by Bascia and Stevenson in 2017 that explored the concept of union renewal in the specific context of the education sector through seven international case studies (three within the ETUCE region). In their report Bascia and Stevenson foreground the critical importance of collective bargaining as central to not only protecting the rights of workers but also for promoting the wider goals of public education. The importance of defending and extending collective bargaining rights cannot be overstated and it is no coincidence that attacks on collective bargaining have been one of the key battlegrounds in efforts to diminish the power of organised teachers and other education personnel. However, in technical terms collective bargain-

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6   https://www.csee-etuce.org/en/resources/resolutions/2853-resolution-on-shaping-the-future-of-europe-the-role-of-education-trade-unions-2018
7   https://www.ei-ie.org/en/detail/16461/resolution-on-education-union-renewal-the-new-imperative

ing is no more than a process or a mechanism and as such, without the ability of a trade union to be able to mobilise its resources of power, collective bargaining of itself delivers little. Ultimately, it is the union's ability to 'build the capacity, commitment and confidence of individual members to act collectively' (Bascia and Stevenson, 2017, p. 9) that is the basis of union power, whether conceived of as economic power at the workplace or political and moral power in the public sphere.

Within this process of union building Bascia and Stevenson highlight the importance of 'building at the base' in which they emphasise the need to connect with members and make the union 'real' in members' lives. This necessarily involves focusing efforts on the workplace as the basic unit for organising. Union power is realised when union members act collectively to take action in order to bring about change and without workplace organisation it is difficult to see how such action can be mobilised. However, this focus on the workplace does not imply a narrow preoccupation only on workplace issues but rather the need to connect workplace concerns with wider questions about quality public education.

Opening up the focus of the union's concerns also makes it easier for the union to construct alliances and coalitions with other groups in civil society and thereby increase leverage in the political sphere and the bargaining process. In this report we have already indicated that research evidence points to the growing importance of alliance building in the repertoire of trade union actions and our survey data suggests this is an important strategy for many education trade unions. Jane McAlevey (2016) has argued that public service unions, such as education trade unions, are particularly well placed to construct these alliances as public service workers can more easily find common cause with public service users. She exhorts trade unions to deliberately frame demands in ways that connect with the aspirations of those in wider society and uses the example of the Chicago Teachers' Union to illustrate her point. McAlevey argues this is essential work for public service unions because creating pressure in the political sphere is a vital source of power when unions are seeking to influence political actors. In McAlevey's words trade unions become '*more* structurally powerful' (p.29) (emphasis in original) when they are able to connect their own concerns with the wider concerns of the community.

This ability to engage with the full range of issues in education, and to frame these issues in ways that help construct coalitions with wider civil society necessarily involves unions in a broader educational project to challenge and reframe dominant narratives: what Bascia and Stevenson identify as 'organising around ideas'. In presenting this case they emphasise the power of dominant discourses to set the parameters within which questions about 'what's possible?' can be considered. Bascia and Stevenson argue that education trade unions cannot avoid confronting, and seeking to re-frame, the dominant ideas that constrain what can be considered as possible. Such an approach recognises that change processes are educational processes and that trade unions that seek to bring about change need to engage in a pedagogical process in which the union performs the function of a collective intellectual. However, this cannot be achieved in any top-down way, or simply by some technical improvement in union communications, but rather it involves the conscious development of union activists as educators. Such grassroots intellectuals are essential to question the taken-for-granted assumptions of dominant narratives where they are often most embedded – in the workplace and in the local community. This

is not a traditional, or easy, way to think about the role of a trade union, but it is one that education trade unions, above all, are well placed to develop.

Much of this analysis emphasises that union renewal can never be reduced to a technical or bureaucratic process. It is not something that can be implemented from above as a managerial response to what may be viewed as, for example, a membership crisis. Arguably more than anything union renewal is about organisational and cultural change within the union which recognises that members must be the engine for change. Renewal cannot be reduced to technical adjustments, or the adoption of new marketing techniques to boost membership, but rather it is about a change in organisational form (Carter et al., 2010) that focuses relentlessly on the development of collective capacity and action.

We conclude this section by thinking through in very practical terms what union renewal in an education trade union might 'look like' and how it might be possible to make judgements about progress in a process of union renewal. Ultimately success must be judged on outcomes and the extent to which union members are able to secure the objectives they have determined for themselves. Union renewal is not about the survival of the trade union for its own sake, but for what the union can achieve for members through their collective endeavours. However, a strategic approach to union renewal always connects this goal to a wider concern about *building* the union. Union renewal requires an unremitting focus on how the union's actions contribute to strengthening the collective capacity of the organisation.

Such a focus on union building requires the organisation to develop a culture of reflection and self-evaluation which, in turn, involves adopting an evidence-informed approach to priority-setting and organisational change. Here we set out a number of 'tests' that can be used to gauge capacity-building in the union. The tests are not presented as a definitive list, but rather a part of a framework for reflecting on how any aspect of the union's activities might be evaluated in terms of capacity building.

Table 8: Five tests of union renewal.

Does the activity . . . ?	Details and indicators
Grow membership	Is membership increasing or decreasing? Where are the changes in membership - sectors, demographic characteristics, geography, contract type, by workplace?
Grow identification and commitment	Very difficult to evaluate - but is there evidence that members feel a stronger loyalty and identification with the union?
Grow participation and engagement	Are members more involved in the union? For example, attending union events, participating in elections, taking on union roles. [note - participation may still be largely passive]
Grow skills and capabilities for leadership and organising	Are union members being supported to undertake more complex union activities - and specifically those that involve leading and organising other union members
Grow activity and action - in the union and with allies	Are members participating in actions intending to bring about change? The distinguishing feature of these activities is that they involve members working with other members to find solutions to the problems they seek to address. [note - participation is, necessarily, active]

The 'five tests' above are incorporated into the framework for trade union renewal and transformation that is presented in the final section of this report.

4. EDUCATION TRADE UNION RENEWAL:
CASE STUDIES
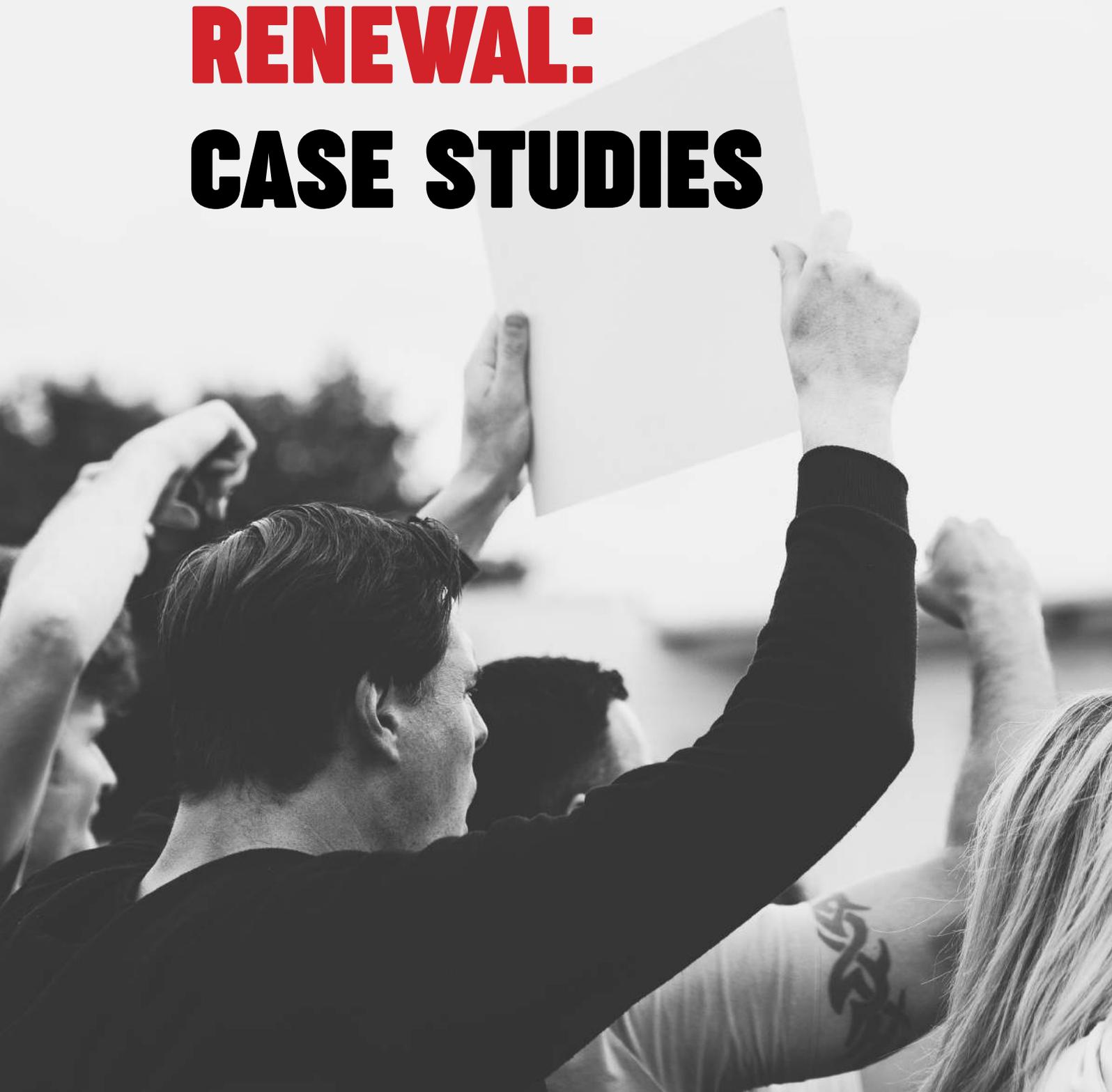
In the section that follows we present a set of case studies based on the experiences of individual education trade unions. Case studies are based on five 'organising themes' that were initially drawn from Bascia and Stevenson's 'seven challenges for union renewal', but which have been adapted for the purpose of this project following activities developed in the workshops and subsequent discussion by members of the project Advisory Group. The five organising themes are:

- **ORGANISING AROUND IDEAS:** REFRAME THE NARRATIVE

- **ORGANISING AT THE WORKPLACE:** BUILD AT THE BASE

- **ORGANISING AROUND WORK:** CONNECT THE INDUSTRIAL AND THE PROFESSIONAL

- **ORGANISING FOR EQUALITIES:** MOBILISE THE UNDER-REPRESENTED

- **ORGANISING WITH COMMUNITY:** BUILD ALLIANCES AND COALITIONS

In addition to the five themes that emerged from the workshops a sixth is included in this report ('Organising in a crisis') as the project developed and the full significance of the coronavirus pandemic became apparent, both in terms of its impact on the work of teachers and other education personnel and its implications for union organising. Each organising theme is illustrated by two case studies but readers are also encouraged to read the case studies 'horizontally' and to reflect on the ways in which many case studies simultaneously demonstrate multiple organising themes.

The case studies are necessarily brief and each is constructed around a common set of five questions. In addition to the organising themes, case studies were selected to provide a range of contexts both in terms of geography but also sector (for example, schools and higher education). All would be described as 'works in progress' with the case studies providing an overview of on-going work. The examples are deliberately intended to illustrate 'novelty' in the sense that unions are adopting new and innovative practices in order to build connections with members. Many of the case studies do have 'success stories' to report but given their different stages of development this is not yet evident in all cases. Case studies were not chosen because they can show in some simplified sense 'what works'. These are education trade unions that are 'doing things differently' and have generously agreed to share their experiences to contribute to collective learning. They are presented in that spirit.

ORGANISING AROUND IDEAS: REFRAME THE NARRATIVE

Unions have always waged 'campaigns' in order to win wider support for their objectives. Sometimes this may be for a very specific demand, such as a campaign to win wider public support for a pay rise or it may be for a less tangible objective, such as a campaign to defend the principle of public education. Outcomes from this project suggest this type of trade union action may be now more important than ever as shifting the balance in public opinion provides key political leverage.

The triumph of neoliberalism highlighted earlier in this report needs to be recognised as a political and ideological phenomenon as much as an economic one. It has sought to re-define who we are in society, and more fundamentally what we understand by society itself. Neoliberalism's success has in part depended on the extent to which the ideas and values associated with it have become normalised as a type of taken-for-granted 'common sense'. Put simply, we have been encouraged to believe that 'private is good, and public is bad'. As these ideas have emerged as dominant in popular discourse they have inordinate influence because they have the power to define the parameters of what is considered 'possible' in any given situation. The danger for trade unions is that a failure to disrupt the dominant discourses that privilege and normalise a privatised and individualised 'common sense' results in only one set of solutions being open for consideration. This was perhaps illustrated most graphically in the years after the economic crisis when deeply damaging austerity policies were presented as though no alternative way out of the crisis was available.

This study points to the need for education trade unions to demonstrate that there are alternatives and to actively 'organise around ideas'. By this we mean taking seriously the need to reframe dominant narratives so that the values and aspirations of education trade unions are able to emerge as the common sense solutions to the challenges and crises that confront Europe's teachers, other education personnel and citizens. However, in this report we argue that 'organising around ideas' is inextricably linked to union renewal and union buiding because we do not believe it is possible to simply reframe any narrative without connecting sometimes abstract ideas with 'on the ground' activism. Rather there is a need to mobilise the collective resources of union members in a reciprocal relationship as both learners and educators. This is about more than educating members but is also about building up the leadership capacities of members so they in turn can act as organisers, constructors and persuaders. Such activist educators can influence fellow workers and those in the wider community where dominant ideas are often most embedded and where they most need to be challenged.

In this study work in this area is highlighted by campaigns involving Egitim-Sen from Turkey and the Lithuanian Education and Science Trade Union (LESTU).

CASE STUDY 1.1

Union: Egitim-Sen (Turkey)

Membership: Egitim Sen organises all the fields of education and science from preschool to higher education.

The case study: *A Teacher Changes the World* campaign

WHAT WAS THE PROBLEM TO WHICH THE UNION WAS RESPONDING?

In 2018 the Turkish government proposed to introduce a new Teaching Profession Law relating to the professional conduct of teachers.

Egitim-Sen immediately recognised the legislation as a serious threat to the professional status and autonomy of teachers by undermining existing professional freedoms and imposing new mechanisms of professional control. Teachers and other education personnel had suffered badly under the authoritarian policies of the Turkish government, in particular following the attempted coup in 2016, and the new legislation was seen as a serious escalation of these authoritarian tendencies.

WHAT DID THE UNION DO?

Egitim-Sen mounted a major campaign to oppose the new legislation called *A Teacher Changes the World.* The campaign deliberately linked the rights and freedoms of teachers to wider questions of freedom and democracy. As such it counter-posed its own message of democracy to challenge the authoritarian nationalism promoted by the government. The campaign worked at multiple levels to educate the union's own membership, the wider teaching profession and the general public.

The '*A Teacher Changes the World*' campaign was a serious attempt by the union to shift the public discourse about the role and contribution of teachers but it was a campaign that depended crucially on connecting efforts to reframe the narrative with the active mobilisation of the education workforce. It specifically sought to draw members into actions in order to increase political leverage. Importantly the union built the campaign from the 'ground-up' by committing to hold union meetings in every school in the country (something the union had not achieved previously). School based meetings were open to all workers, not just union members. Workplace representatives were central to the campaign and

specific training was provided so that workplace representatives could operationalise the campaign in their own school.

A range of actions were developed that were carefully graduated so that where teachers were afraid, or lacked confidence, it was still possible to draw them into activity. This culminated in a major open air mobilisation in Ankara on 23 November 2019 which was the first such meeting of its kind since the bombing of a peace demonstration in Ankara in October 2015.

WHAT HAVE BEEN THE KEY CHALLENGES?

Key challenges derive directly from the hostile environment faced by trade unions in Turkey. Senior regional administrators, and many school leaders, are fundamentally political appointments based on the patronage of the ruling party. The union met robust resistance to organising school level meetings and had to mobilise considerable union resources to challenge these obstructions. In such an environment it is unsurprising that many teachers and other education personnel also experience fear and intimidation and are reluctant to stand up for their rights. Many teachers and other education personnel in Turkey are acutely aware of colleagues who have been dismissed from their work, and sometimes imprisoned, without any access to justice.

The union was also aware that its membership was uneven with some parts of the country much less well organised. In these areas the union committed resources to embed organisers into these localities – ensuring there were no 'no-go' areas for the union.

WHAT HAS THE UNION LEARNED?

Union representatives emphasised the importance of *saliency* – the need for the union to mobilise around issues that members determine are important. It was argued that there is little scope for a union hierarchy to impose issues on reluctant members, but rather the union needs to connect with the issues that members themselves prioritise. That said, what this case illustrates is that 'what members want' is not static, but that serious education work *within* the union is able to shift members' priorities and build unity around agreed issues. Campaigns that neglect this preparation are likely to generate only limited member commitment and support.

The union also highlighted the central importance of the workplace representative. The *Change the World* campaign made extensive use of traditional and social media platforms but one union official commented '*face to face contact is our most valuable organising tool*'. Here it was argued that teachers in Turkey face acute levels of intimidation that have been deliberately intended to destabilise and defeat Egitim-Sen. Building the confidence of teachers and other education personnel to stand up for their rights involves carefully building the trust of education workers in the union. This is best achieved when the 'face of the union' is someone teachers know and trust and that when union members meet

together they are meeting with their own colleagues in their own workplace. This was seen as central to challenging the fear generated by the possibility of employer reprisals. The union emphasised this is complex work and hence training for workplace representatives was seen as critical.

HOW HAS THE INITIATIVE HELPED BUILD THE UNION?

The '*A Teacher Changes the World*' campaign represented a major mobilisation by Egitim-Sen, and its biggest campaign since the attempted coup in 2016, and the subsequent imposition of a State of Emergency (imposed initially for three months, but which lasted two years). The campaign was explicitly counter-hegemonic - it sought to disrupt the dominant narrative being promoted by the Turkish government and reframe teachers' professional rights as inseparable from wider democratic freedoms. In so doing it sought to link the legitimate demands of teachers with the wider interests of the Turkish population. However, this was never a top-down campaign in which the union presented its alternative vision on behalf of union members, but rather the campaign depended crucially on mobilising members as the engine of the campaign itself.

The union's ability to develop a campaign that successfully articulated the views of grassroots teachers allowed the union to 'turn a corner' and to progressively rebuild after many years when it had suffered as a result of strong attacks from the state. During the period of the campaign Egitim-Sen recruited 7,000 new members, many of whom re-joined having been intimidated into leaving in the past. A disproportionate number of new recruits were young teachers who saw the union articulate a vision of education, and their role as teachers, that was capable of inspiring them. One very tangible sign of this increased union commitment was an increase in members putting themselves forward for union office. The union's training programme then ensured these new activists were able to take on more developed roles in building union support among their colleagues.

One union official concluded that the campaign had demonstrated to Turkish teachers and other education personnel that after many difficult years the union could be a vehicle for positive change.

CASE STUDY 1.2

Union: Lithuanian Education and Science Trade Union (LESTU), Lithuania. (formed in 2019 as a merger of Lithuania's two largest education trade unions).

Membership: LESTU represents members from all education levels (early childhood education, pre-primary, primary, secondary, vocational education, higher education and research).

The case study: *'100% Teacher' initiative*

WHAT WAS THE PROBLEM TO WHICH THE UNION WAS RESPONDING?

Lithuania has an ageing teaching profession. In 2018 the average age of teachers was 55 years. In 2016/17 6% of teachers were at retirement age and by 2021 that figure will increase to 20%. However, there is no corresponding recruitment of new and younger teachers. The role is not viewed positively in society with 'public perception' data in TALIS showing a much lower score for Lithuania than the TALIS average. Moreover, of those who undertake a form of teacher training only 15% enter the profession.

These issues are then mirrored in the union. The age profile of those involved in the union has reflected the predominantly older nature of the profession. This created further problems for the union. Older members, familiar with the Soviet era, had a largely passive view of union membership (the union as a club that offered benefits), while younger teachers did not see the union as an organisation able to articulate and deliver a view of positive change.

WHAT DID THE UNION DO?

The formation of LESTU in 2019 as a merger of two previous unions, and the adoption of new leadership provided an opportunity for the union to reassess its direction and how it might help address the issues identified above. The union's response was to launch the '*100% teacher*' campaign, although as one union officer indicated '*It isn't a campaign – it is an idea. It is much broader than a campaign*'. The initiative has three broad objectives:

- To shift the public discourse in relation to teachers and how teachers are perceived -highlighting the positive contribution of teachers to society and the public good.

- To shift teachers' own thinking about the teaching profession and emphasising the opportunities for professional agency.

- To shift teachers' thinking about the union and to see the union as a vehicle for change, but one that requires their active participation.

The initiative has a number of strands, with a strong emphasis on media engagement, both mainstream and social media. LESTU takes media organising very seriously and has sought to 'professionalise' its communications. This was not activity that had always been seen as a priority in predecessor unions.

However, the union has also sought to actively connect with members and emphasises that face to face, personal contact is crucial. This has involved actively developing its regional organisation with regional officials being encouraged to prioritise the involvement of new members. It has also involved working with student groups and pedagogical institutes to ensure the union is forming relationships with training teachers. The union's aim is to actively intervene to ensure training teachers see the union campaigning for a vision of education that inspires them, but also encourages training teachers to see themselves as part of the movement to bring about change.

WHAT HAVE BEEN THE KEY CHALLENGES?

The union is engaged in a campaign to shift attitudes at multiple levels. These are deeply embedded, reflect particular cultural and historical factors, and are reinforced every day by powerful interests such as the media. Convincing members that this type of 'agenda setting' is work the union should be involved in, let alone that members should be actively engaged in it, requires patient argument building. This was expressed by one union officer as '*We are trying to change a mentality - to get people to think about the union in a different way. To see the trade union as a movement or a community*'.

As indicated, and with some risk of simplification, but there are many members who see themselves as passive consumers of union services, while there is a group of younger members (and crucially, non-members) who do not see the union as capable of securing the changes they want. Confronting these attitudes, and finding the mechanisms and communications channels to do it, while working with resources constraints is an on-going challenge.

WHAT HAS THE UNION LEARNED?

The '*100% teacher*' project is in its very early stages and it is important to see the initiative as a long term project. '*100% teacher*' is not a one-off campaign, but rather it seeks to shift discourses (within which specific and more immediate campaigns may be nested). Developing a shared understanding among activists of a long term project (thinking five and ten years ahead) was seen as crucial.

Such a perspective also requires serious prioritising with union officers recognising that early plans were over-ambitious and unrealistic. Keeping enthusiasm in check was identified as frustrating but necessary.

Finally, and linked to the above, was the need to recognise the scale of the challenge, and to sustain hope and optimism as a consequence. Historical and cultural factors mean that cultures of passive union membership are deeply embedded. At times developments can happen quickly (such as a membership increase when the coronavirus pandemic struck) but for much of the time this is not the case. Recognising the scale of the challenge avoids being demoralised when changes do not happen in ways that might be hoped for.

HOW HAS THE INITIATIVE HELPED BUILD THE UNION?

LESTU is clear that the '*100% teacher*' initiative is a long-term project which at this moment is in its infancy. The union has experienced a recent increase in membership but this was clearly Covid-19 related. The union recognises that the influx of new members provides an opportunity but that its challenge will be to retain the new members in the union and to find ways to engage them in union organisation (Vandaele, 2020). The union also has to develop criteria that it can use to evaluate its own effectiveness. It recognises that some of the ambitions of '100% teacher' can be difficult to evidence, but that it will be important to be open and self-critical as the project develops.

ORGANISING THEME #2

ORGANISING AT THE WORKPLACE: BUILD AT THE BASE

Perhaps the clearest theme that emerged from the project workshops and the case studies, and which was reinforced by survey results, is the need to develop union capacity at the lowest level of the organisation – this is usually the workplace, either at the level of the individual school, college or university. This is what Bascia and Stevenson (2017) described in their report as 'building at the base'.

The extent to which education trade unions have traditionally developed a formal workplace presence varies considerably depending on contextual issues. Different countries, different education sectors and even the political and philosophical position of different unions in the same country and sector can all shape the extent to which particular unions have placed a focus on workplace organisation. These differences are reflected in the varied nomenclature with 'school representative', '*correspondent*' and 'Club leader' being some of the titles that feature in this report. Where such a workplace union presence exists it can take very different forms with some unions using workplace representatives simply as channels of communication, whereas other unions might expect such representatives to take on more formal roles representing members' views to management and employers.

In this study we argue that the development of a union presence at the physical location where members are working, that is in their individual workplaces, plays a key role in connecting members with their union and making the link to the union 'real'. When trade unions have a visible representative in the workplace then union members literally 'see' the union at work. The union has a physical manifestation - it exists. As one union officer indicated in this project – the union has '*a physical incarnation*' to the unions' members, and perhaps equally importantly, those workers who are not union members. Seeing the union in the form of a colleague helps build crucial trust in the organisation.

The role and purpose of workplace representatives will vary significantly depending on the workplace context and the wider industrial relations framework. In all instances such representatives have a key role in acting as a live and organic link between members and the union, and where this role is developed strategically it is clear the benefits of workplace representatives are amplified. The key however is to consider how such representatives can be both supported and developed in a way that is intentional and strategic not serendipitous and accidental (Han, 2014).

In this section we present two case studies that reflect different aspects of workplace representative development - Lärarförbundet in Sweden and the University and College Union in the UK.

CASE STUDY 2.1

Union: Lärarförbundet, Sweden.

Membership: Represents teachers, head teachers, student teachers and study and careers advisors across all types of educational institutions including schools, preschools, leisure centres, adult-education centres and universities.

The case study: Building workplace dialogue

WHAT WAS THE PROBLEM TO WHICH THE UNION WAS RESPONDING?

Trade union membership levels are generally high in Nordic countries such as Sweden, with density levels among teachers and other education personnel being among the highest in the country. However, the union was aware of emerging problems. Membership had been declining over several years and it was clear that new entrants to the teaching profession (younger teachers) were less likely to be union members than the retired teachers they replaced. Survey work undertaken by the union indicated members were generally satisfied with the union's work in terms of advocacy at the national level, but they did not always see the union making a difference in their working lives at their place of work. Furthermore, evidence suggested that teachers felt strongly about a wide range of issues relating to every aspect of their work, but they did not always see the union as the solution. Surveys also showed that union satisfaction at workplace level correlated with teachers' willingness to recommend union membership to colleagues. The perception was that the relationship with members had become largely transactional whereby members received support if they needed it, in return for their subscription.

The union recognised it needed to change in order to retain its relevance to members and be able to respond to new developments, such as rising teacher workloads and organising in the private education sector.

WHAT DID THE UNION DO?

In 2014 a new leadership in the union committed to tackle the problems identified above. The approach adopted was to seek to make the union more relevant to teachers, and to demonstrate that the union can be the solution to many of the concerns that teachers have about all aspects of their working lives. The principle approach was to take the union more conspicuously into workplaces - and this took two forms. First, the union sought to

engage the membership in a substantial dialogue about the issues they face and the role of the union. This took place in Spring 2017, involved all available channels within the union, and involved more than 36,000 members. The result of the dialogue formed the basis for the union's long-term political programme and priorities. However, the union also committed to *maintaining* this dialogue on an on-going basis rather than it being seen as a 'one off' event. This was reinforced through a congress decision committing Lärarförbundet to continue this connection and dialogue with its members.

The key to maintaining this dialogue was to develop the role of union activists involved at the level of the municipality and also the role of school-based union representatives. There was a clear recognition that the most effective and sustainable organic links with members are through the work and activity of those who represent the union 'on the ground'.

In order to support this shift in thinking (which was an adaptation of existing practice, not a novelty) the union framed the role of union officers and workplace representatives around three discrete, but completely interdependent, activities - '*recruit, listen, act*'. The focus on listening signalled the union's commitment to respond to the priorities identified by members and avoiding defining members' problems for them, and then presenting pre-determined solutions. The focus on action highlighted the union's role as a collective organisation of workers focused on bringing about change, reflecting the historic mission of trade union organisations. Recruitment acts as both the catalyst and the outcome of these activities in an iterative, interdependent and cyclical process.

Union education programmes have been sharply focused on developing this approach to working among local activists and workplace representatives. Less attention is devoted to delivering content-driven training and more attention has been directed towards developing the skills necessary to recruit members, to find ways to surface their concerns and to mobilise their resources to deliver action. Education for activist leaders at the level of the municipality has been especially important in order to spread this approach to a wider layer of activists. The union has focused this work on a few local branches at a time, rather than trying to cover every branch simultaneously and this has been considered very effective.

WHAT HAVE BEEN THE KEY CHALLENGES?

The work undertaken by Lärarförbundet is a substantial and long-term project which requires support and commitment from across the union organisation. Securing such support is inevitably a complex, but essential, process.

Key to the changes being pursued has been a re-fashioning of the role of the activist leaders at the level of the municipality. These key people in the union would be heavily involved in consultations and negotiations with local employers with a strong focus on generating solutions to problems. In their newly configured role these activists have had to become more 'member facing' - visiting schools more frequently and having more direct contact with members. Given the experience and knowledge of these individuals, and the very

considerable workloads they carry, it was not immediately clear how they might take on different forms of working, or even why they should do so. Convincing these key figures in the union that change was necessary and would lead to benefits was inevitably and understandably an issue that required considerable attention.

WHAT HAS THE UNION LEARNED?

Union officers identified a number of key issues that have emerged from their experience:

- Major cultural change is no task for the faint-hearted! Such change requires considerable effort and investment (and can feel like a major risk) but that once committed, it is important to '*commit to the long haul*'. However, in this process it is also important to avoid being distracted or extending the organisation beyond what it is capable of achieving. Changed practices need to be properly embedded before new initiatives are pursued.
- Focus relentlessly on winning support in all parts of the organisation. Full commitment from the elected leadership of the union is essential but it is also important to work across the whole union organisation. In this process it can be tempting to neglect the importance of the union's staff, who as workers and employees in the organisation have much invested in any changes.
- Be able to respond to the '*Why?*' question – being able to explain to all involved why change is necessary and how it will lead to improvement. In particular it has been important to demonstrate to activists how changes will impact them and benefit their experience.

HOW HAS THE PROJECT HELPED BUILD THE UNION?

Lärarförbundet's change project is a long-term initiative which is currently in its relatively early stages. There are already positive signs relating to union building with local branch leaders adopting changed ways of working, which in turn is resulting in an increase in the number of workplace representatives and increased union presence at the workplace. This correlates with a substantial decrease in those choosing to leave the union and union officials are confident this is one important reason for the change.

The strategy has proven particularly effective in the private sector where some of the issues for the union are posed most starkly (due to the absence of negotiating machinery comparable to the municipal sector). In this sector the union has witnessed a 2% increase in membership and a 20% increase in the number of workplace representatives.

CASE STUDY 2.2

Union: University and College Union (UCU) (UK)

Membership: represents staff in UK higher, further, adult, and prison education

The case study: Transforming UCU: a development programme for workplace leaders

WHAT WAS THE PROBLEM TO WHICH THE INITIATIVE WAS A RESPONSE?

There was a recognition that the education sectors that UCU represented were changing rapidly, but the union was not always keeping pace with the changes. Changes in the wider political and economic context, the labour market, technology and the workplace were all substantial. The union however remained focused on a national collective bargaining environment that barely existed in further education and its meaningfulness was also being eroded in higher education.

The union needed to equip members in branches (usually co-terminous with a single institution) with the skills to respond to these changes, but also the ability to develop longer term strategic vision.

WHAT DID THE UNION DO?

UCU established the *Transforming UCU* development programme for workplace leaders. The programme is unequivocally based on a commitment to build leadership capacity and critical strategic thinking, rather than provide participants with a narrow set of skills or capabilities. The clear aim is to support union activists build power at the workplace in order to support more effective bargaining. The programme involves two residential courses with participants undertaking a self-identified mini-project between residentials. Course participants receive mentored support with their projects.

The course is not aimed at particular office holders in local branches but is potentially open to any activist seeking to play a more substantial role in the union. The programme is over-subscribed and participants are partly selected to ensure the profile of the union's membership is reflected by those attending.

The course programme has been carefully designed to meet the needs of both participants and the union. A key feature is that several contributors to the programme are internationally known researchers specialising in labour and trade union studies. The course explicitly links theory and practice and organisers are unapologetic about making demands on course participants - to '*challenge and provoke'.* The intention is to create a space where those attending can participate in open and self-critical discussion about challenges, problems and possibilities. In this sense it is important that the programme itself models the culture it seeks to develop in the union.

WHAT HAVE BEEN THE KEY CHALLENGES?

Crucial to the success of the programme has been commitment and support at the very highest levels of the union. During the early stages of the programme the union's leadership changed, but support for the programme has been maintained. Such commitment has involved a recognition that the project is a medium to long term endeavour and this inevitably involves a willingness to accept some risk-taking on the part of the organisation. Evaluation is considered important, indeed critical self-evaluation is considered essential, but equally important is a willingness to avoid demanding 'quick wins' or chasing easy to measure (but often distracting) targets.

In trade union terms the programme is relatively costly and a significant investment. However, it is important to recognise that programmes with similar ambitions in a commercial organisation would likely attract much more substantial resourcing.

WHAT HAS BEEN LEARNED FROM THE PROJECT?

As the programme has developed there has been a commitment to explore different ways of delivering the programme, including identifying and building on pre-existing networks, such as those in geographical areas. This will help participants build and reinforce their social networks within the union. Strengthening social capital across the organisation is seen as key to building organisational capacity. Actively exploring ways that course participants can connect with, and support, each other is seen as an important future development.

A further key learning point has been the need to maintain a relentless focus on the programme's key objective - supporting workplace leaders to evaluate and navigate the strategic choices available to them in order to build power for bargaining.

Finally, there is a need to acknowledge the challenges of seeking to bring about cultural change in an organisation. Such work is almost always hard and slow. In some cases participants on the programme are being encouraged to 'unlearn' deeply embedded practices and established ways of working. In other instances participants return to their workplaces and branches and find that local factors can make bringing about change very difficult. Maintaining the longer-term commitment and momentum of participants

once the programme is over is always a priority, but often a challenge (new ideas are currently in development to maintain contact with participants and to ensure continued impact).

HOW HAS THE PROJECT HELPED BUILD THE UNION?

The programme has avoided being tied to a narrow set of targets, but takes the commitment to make a difference seriously, and has recently engaged in a comprehensive evaluation. Programme co-ordinators are very conscious of not over-claiming successes but argue that evaluation evidence does point to some significant benefits. For example, the programme did not set out to increase recruitment *per se* but the programme evaluation does suggest at least an indirect relationship between participant's involvement in the programme and above average membership growth in their branches.

The programme evaluation also highlighted the building of leadership capacities among participants. In their own words one programme participant commented:

"
the course [helped] me think about how to communicate, how to engage with new reps as a 'leader' within my union branch, how to motivate and mobilise (giving tasks, sharing information, mentoring) and how to frame our arguments in concise communications."

There is also evidence from the evaluation that programme participants have had some successes securing new collective agreements at institutional level.

Finally, the programme evaluation provided some limited, but clear, evidence of course participants presenting themselves for union office, including at national executive level. Again, there is no attempt to claim a direct relationship (ie that the members would not have presented themselves for office otherwise) but the evidence does suggest that programme participants are more willing to take on some significant leadership roles in the union both locally and even nationally.

ORGANISING AROUND WORK: CONNECT THE INDUSTRIAL AND THE PROFESSIONAL

Education trade unions have historically experienced a tension between representing members' so-called professional interests (for example relating to curriculum and pedagogy) and what are often considered as more traditional trade unions concerns, such as salaries and working conditions.

The membership of each individual organisation must decide for itself how their union organises, and around what issues. However, this research does suggest that the 'industrial-professional' distinction in the work of teachers and other education personnel is an unhelpful divide that fails to reflect the realities of their work.

In this study we demonstrate that education workers in Europe have suffered badly in the years following the economic crisis. Pensions have been cut (and remain under threat), salaries have stagnated and workloads have escalated. However, of equal concern is the extent to which the professional autonomy and judgement of teachers and other education personnel have been eroded by an encroaching managerialism. For example, what teachers teach, how they teach, how students are assessed and how their own work is evaluated are all issues that have experienced profound changes in recent years. Certainly these issues look different in different countries but there is little doubt that the tendency to assert ever greater control over the work of teachers and other education personnel is one that has been very widely experienced.

Our argument is that education trade unions must represent the interests of teachers and other education personnel in relation to the totality of their work, not only some parts of it. Payment will always be an absolutely fundamental issue in the wages-for-work transaction, but the nature of the work in that exchange relationship, and the factors that shape it, are equally important. What is the work and who gets to decide what the work is and how it is performed? In recent years we would argue that many teachers and other education personnel have found these questions posed very starkly as they have experienced what Goodrich (1920) described as the 'frontier of control' being pushed further and further back at the expense of their professional judgement. It is what Harry Braverman (1974) referred to as the 'separation of conception and execution' in contemporary work and is the essence of the deskilling and deprofessionalisation that has shaped the working lives

of many teachers and other education personnel. Moreover, these issues are likely to be posed more sharply in the future as technology becomes more embedded in all aspects of the labour process of education workers.

In this report we highlight the work of two trade unions, Union Nationale des Syndicats Autonomes (UNSA) in France and Utdanningsforbundet (UEN) in Norway who have sought to organise around all the issues of concern to their members in their work with a particular focus on professional concerns.

CASE STUDY 3.1

Union: Union Nationale des Syndicats Autonomes (UNSA), France.

Membership: UNSA-Education is a federation of 22 trade unions across the education sector. This case study focuses on the union representing teachers in primary and secondary education.

The case study: SE-UNSA: a new educational project

WHAT WAS THE PROBLEM TO WHICH THE UNION WAS RESPONDING?

Education trade unionism in France experienced a significant rupture in 1993 with the dominant trade union fracturing into multiple parts and two new federations : Unsa-Education and FSU being formed. This was described by one participant in the study as '*a trauma*'.

For UNSA-Education and especially SE-Unsa, this experience posed an existential threat. For 15 years the union experienced declining membership and a diminishing influence on professional bodies (due to deteriorating performance in professional elections). The situation facing the union was seen as unsustainable and a crisis to which the union needed to develop a strategic response.

WHAT DID THE UNION DO?

In 2008, following the election of a new leadership, UNSA committed to a long-term project of reinvention. This strategy focused on two 'headline issues', underpinned by three supporting strands of activity. The two headline issues sought to position the union around a clear political line and a new educational project. The union's political positioning committed UNSA-Education and SE-Unsa to constructive engagement in collective bargaining while the new educational project involved the union broadening its concerns to include a wide range of professional issues. The union sees advocacy around issues such as student learning conditions, inclusive education and teachers' professional development as core union priorities with a clear and coherent articulation between the union's political line and educational project.

The 'first order' priorities identified above have then been supported by three facilitating elements that include the adoption of new organisational methods, a strategic commitment to the development of activists (in order to build union presence in schools) and a comprehensive review of union communications (both internal and external). New organisational methods have involved increased used of data to identify growth areas to prioritise. This has been controversial at times, but union officials believe it has been effective. Substantial union resources have been devoted to providing professional development for activists with a dedicated training team established while communications have been repurposed to take advantage of modern social media platforms.

WHAT HAVE BEEN THE KEY CHALLENGES?

The union is clear that the organisation has been engaged in a long-term process of cultural change (more than 10 years and still in process). At times such change has challenged those who benefit from the maintenance of the status quo, and this has sometimes generated resistance. The union's approach has been to develop a collaborative approach to change with a strong focus on giving activists the space to explore, explain and debate issues. Quite understandably, activists' priorities are usually focused on the immediate problems that confront them and encouraging those who face considerable pressure, but with little time, to take a longer-term perspective can be difficult.

Piloting new practices and evaluating them was considered critical in convincing some members of the efficacy of particular methods.

WHAT HAS THE UNION LEARNED?

Central to SE-Unsa's process of cultural change has been a commitment to reconnect the union organisation with its members both intellectually and physically. As one union official said – '*the union was seen as too far away from reality, too far away from their [teachers'] reality*'. Three elements were identified as crucial to this process of reconnection.

First was the need to connect with teachers in their professional roles – and to work in ways that articulate teachers' professional experiences. '*Too often we use 'union language' – nobody speaks like us! It is exclusive and is not the language teachers use to talk about their work*'. The need to adopt 'a common language' to ensure the union was articulating teachers' professional concerns (as determined by teachers' themselves) was seen as crucial.

Second was the importance of connecting with teachers in their workplace so that the union literally became visible (a '*physical incarnation*') to members. This has involved ensuring local activists make regular school visits and also developing the role of '*correspondents*' – teachers in the school who act as the union representative. It was argued that not only do teachers physically see the union, but they also appreciate that union representatives are their colleagues – they are '*teachers like me*'. This aspect of the renewal project is captured in the titling of a specific aspect of the work known as '*colleague to*

colleague' which emphasises the need for members to have direct contact with union representatives at their place of work.

A final element of this process of 'reconnection' has been the adoption of changed practices within the union which have made structures less formal and bureaucratic, making it easier for those less aware of how the union functions to get involved and have a voice.

HOW HAS THE INITIATIVE HELPED BUILD THE UNION?

The project described in this case study has had some success in reversing the fortunes of the union. Three particular benefits have been identified:

- Declining membership has been reversed and now the union enjoys year-on-year increases in membership. This has been sustained over several years.

- The union's activist base has been expanded, as has its network of *correspondents* (workplace representatives). The union's enhanced membership data confirms a clear relationship between the presence of a school correspondent and increased membership density at that workplace (although it is accepted the nature of the relationship is not a simple one of 'cause and effect').

- Increases in membership have in part focused in meeting the specific needs of younger teachers. As a consequence the union's membership has become more diverse not only in terms of age but according to gender and race/ethnicity also. This increasing diversity is in turn reflected in the profile of activists. One union official commented that '*young members are not affected by the history many of us have – they are building a new union*'.

CASE STUDY 3.2

Union: Utdanningsforbundet (UEN), Norway.

Membership: Represents professionals with teacher and academic qualifications across the entire Norwegian education system from early childhood education to higher education

The case study: UEN involvement in reform of the Norwegian national curriculum

WHAT WAS THE PROBLEM TO WHICH THE UNION WAS RESPONDING?

In 2016 the Norwegian government published a White Paper proposing a major revision of the Norwegian national curriculum at both primary and secondary level. UEN supported the broad principles of the proposals which it believed aligned with its own argument for an enhanced role for teacher agency in professional decision-making.

Following publication of the White Paper there followed several major consultation rounds to develop the new core curriculum as well as new subject curriculum. UEN recognised the need to organise members to participate in the consultation rounds not only to ensure that the agreed curriculum reforms reflected the views of professionals, but it was also essential for the union to model the principles of co-construction and teacher agency that it had been advocating.

The consultations had an unprecedented level of teacher involvement. Although this cannot be directly attributed to the work of Utdanningsforbundet it is widely accepted that the union's work played a key role in achieving this level of engagement.

WHAT DID THE UNION DO?

Social dialogue in the Norwegian education system can generally be considered robust at all levels and so it was uncontentious that the union was strongly represented in committees, working parties and expert groups related to the development of the new national curriculum.

However, from the union's perspective it was essential to mobilise the voice of grassroots teachers to ensure that the opportunity provided by the consultation was maximised.

The union committed considerable resources to ensure active participation and involvement of the teaching profession as a whole, and amongst union members and delegates in particular. The union worked to communicate key issues, inform about the principal debates and explain why and how the teaching profession and union delegates could participate in the consultation processes. This involved an ambitious programme of conferences, seminars and training courses. Several events were live streamed (long before coronavirus made such a practice common). The union actively worked to support the election of UEN members to expert groups that were established to develop subject curricula. Support was provided to members and activists at all levels of the union, including those representing the union at municipal and regional levels.

A particular focus was placed on mobilising the teaching profession and supporting workplace representatives. In Norway union members at the same school are referred to as a 'club' and the workplace representative is known as the 'club leader'. The union worked to ensure that the club leader had the necessary information, tools and resources both to engage union members and to have effective dialogue with school management. A key goal was to ensure that the schools systematically involved the teaching profession in all the phases of revising the national curriculum.

WHAT HAVE BEEN THE KEY CHALLENGES?

UEN is clear that the responsibility for driving forward the reforms rested with the central and local government authorities, in line with the Government White Paper. The union believed it was necessary to hold these actors to account in this regard, and to ensure that consultation was genuine and that policy implementation was taken seriously, with appropriate time and resourcing for teachers' involvement.

It was particularly important to ensure that teachers had adequate time to participate in the curriculum revision processes. The workload pressures on teachers are well understood and this can make their meaningful involvement in policy consultations very difficult. The union committed to ensuring that time and space was created to support teacher engagement.

The UEN has a well-established network of club leaders in schools, but these representatives have typically been less well involved in representing teachers in professional and pedagogical development processes at the workplace level. Developing the capacity of union delegates to not only represent members' interests with regards to salary and working conditions but also with regards to professional and pedagogical issues was therefore a strategic priority. Providing club leaders with the skills and confidence required to take on this organising role with their colleagues as well as in social dialogue with school management was identified as key.

WHAT HAS THE UNION LEARNED?

UEN benefits from generally robust social dialogue with other actors in the educational policy-making processes. Developing and maintaining this dialogue and building the trust that sustains this is seen as a key issue for the union. The experience of the national curriculum reform in Norway reaffirms the importance of strong social dialogue, but also highlights the importance of extending this across the full range of issues that confront teachers in their working lives. Policy making on curriculum and pedagogical issues relate not only to the quality of education provided, but also to the quality of working lives of teachers and other education personnel and therefore need to be developed in a framework based on social dialogue.

However, social dialogue on professional issues cannot be a bureaucratic and technical process that feels remote and disconnected from teachers. The union's role in formal social dialogue mechanisms provides a key voice for teachers and school management, but the development of an 'activist profession' (Sachs, 2003) requires the active engagement and involvement of the whole profession both in policy making and in continuously ensuring professional development from within. A key goal for the union has therefore been to mobilise the whole profession with club leaders encouraged to invite all teachers and also school management to club meetings when curriculum reform was being discussed. This approach is summarised by a senior union official:

"

we [have been] given trust and confidence to play a key role - and with that we must show that we step up and take that responsibility and take that role in developing our own teaching profession from within'.

Supporting good pedagogical and professional practice requires continuous involvement and participation of the teaching profession - in other words, a strong focus on professional development from within. Therefore, the UEN works systematically to ensure that the voice of practitioners at the workplace level is central to the change process. This involves supporting both teachers and school leaders (the union represents both) to ensure that the right working conditions exist to allow everyone to participate. The particular needs of school leaders were also prioritised by the UEN, as these people often find themselves under considerable pressure to 'deliver' projects at school level that have been determined and imposed from above. This requires the union to actively organise 'on the ground' in order to create the conditions for everyone to be able to participate. Club leaders with strong support from municipal branches were essential to this process. Supporting club leaders, through communication, training and networking, to undertake this work was identified as key.

HOW HAS THE INITIATIVE HELPED BUILD THE UNION?

The UEN has increasingly sought to represent teachers and school management on professional issues, as well as industrial matters, and has established considerable credibility as the 'voice of the profession'. Throughout this time the union has seen membership rise and although there is no direct link to the increased focus on being a 'union of professionals' (Bie-Drivdal, 2020), it may be reasonable to suggest at least an indirect link.

In terms of mobilising the teaching profession around the national curriculum reform, the union considers it too soon to identify clear benefits in terms of union building. However, one union official did suggest that the union's initiative had tapped into an interest with many teachers and '*had helped strengthen their identity with us as a union of the profession.*' There have also been clear benefits in terms of developing the skills and capacities of club leaders as well as delegates at the municipal and county levels. The exercise had highlighted many very capable union members and the union has deliberately drawn on their skills and sought to develop them further both as professionals and union representatives. In this sense the involvement of UEN in Norway's national curriculum reform has provided teachers with a powerful professional voice, and has strengthened the union's claim to be the 'voice of the profession' in Norwegian education policy debate.

ORGANISING FOR EQUALITIES: MOBILISING THE UNDER-REPRESENTED

Trade unions have traditionally had a strong commitment to promoting equality and inclusion, most obviously in the labour market, but often in wider society also. Trade union activists have often been in forefront of struggles to challenge inequalities and discrimination on grounds of gender, ethnicity, disability and sexual orientation.

However it is also important to recognise that trade unions have oftentimes played a role in perpetuating inequalities and reproducing them, not only in the labour market but also within union organisations. For example, when trade unions are forced to defend status quo arrangements in the labour market against attacks from employers the effect can be to defend arrangements that are already structurally discriminatory. At the same time, a trade union's own structures can reproduce inequalities with marginalised groups being under-represented in all aspects of all trade union organisation. Such inequalities often become starker at higher levels within the organisational hierarchy. The tendency to treat 'the membership' as a homogenous group of workers with shared interests can fail to capture the (increasing) diversity of the workforce and the extent to which the status of some workers can privilege their position in relation to others.

In recent years there has been increasing awareness of the need to challenge inequalities in the labour market by championing bargaining demands that address equalities issues, but also to address the cultural and structural issues within trade unions that can reproduce and embed inequalities in the organisation. However, this activity has taken place at a time when the crises that confront education workers have threatened the limited gains that have already been made. One of the most striking impacts of all the crises we experience, whether economic, political, social or health, has been to widen inequalities and to sometimes throw into reverse trends towards greater equality.

It is important therefore for education trade unions to learn from, and build on, the strong equalities agendas that have been developed in many unions in recent years. Examples of this work in this study were illustrated by unions that prioritised bargaining issues impacting marginalised groups, but equally important were cases where unions have implemented structural and cultural changes to ensure that specific groups who may be under-represented are able to participate fully in the organisation. What emerges from these examples was the commitment to create spaces for 'self-organising' among under-represented groups. In these instances it was recognised that particular groups are likely to flourish in the union when they do not have to do so on terms determined by others, or they do not have to wait to be invited, but structures are created that allow members to determine for themselves their own priorities and how they want to work.

Those who are members of particular groups are able to organise their own actions and events in ways that address their needs.

Limited space in this report does not allow us to provide case studies that reflect all the different issues around which this type of organising work is taking place. The first case study focuses on Italy's FLC CGIL and its work organising precarious workers. The second case study focuses on the work undertaken by Polish union ZNP to encourage younger members to participate in the union and to take on leadership roles and activities local and nationally.

CASE STUDY 4.1

Union: Federazione Lavoratori della Conoscenza (FLC CGIL), Italy

Membership: represents education workers across the whole Italian education system from pre-school to higher education and research.

The case study: *Ricercatori Determinati* (precarious workers network)

WHAT WAS THE PROBLEM TO WHICH THE UNION WAS RESPONDING?

The Italian university system is blighted by widescale precarity. Italy's education system has suffered from historical underfunding and this under-investment was exacerbated by the economic crisis. Following the crisis, the '*Riforma Gelmini*' were introduced which were intended to increase 'efficiency' in Italian universities, but which have served to increase precarious work in the system. In the 10 years after the crisis 15,000 tenured positions were lost in Italian higher education. Sixty percent of teaching staff are on precarious contracts and 93% of such staff are forced to leave their employment each year. Research shows that women are disproportionately impacted by these working conditions.

The union has traditionally found it difficult to organise and represent precarious workers in part due to their unstable employment situation but also because of their diverse experiences and needs. As one union activist commented '*precarity divides*'. The union acknowledged that many precarious workers did not see the union as a solution to their difficulties.

WHAT DID THE UNION DO?

Recognising the challenges the union had experienced organising and representing these workers in May 2018 it decided to work with a range of other actors and formed a specific network focused on organising precarious workers - *Ricercatori Determinati* (the title 'Determined Researchers' is also a pun as '*determinati*' in Italian corresponds to 'fixed term'). The formation of a looser and more autonomous network was intentionally meant to overcome the reluctance some workers had to participate in trade unions. FLC CGIL has a 'close relationship' with *Ricercatori Determinati*, and shares many activists, however the union is careful not to monopolise the network.

Many of the actions of *Ricercatori Determinati* can be considered traditional campaigning activities. The network has a specific focus on presenting concrete proposals that will improve the working lives of precarious workers (and has taken two cases to the European Court of Justice), but the group also adopts more outward facing activities that are intended to publicise issues, raise awareness and educate others about the plight of the precarious. The network has organised a wide range of events at both a national and local level with recent successes focused on organising locally in institutions with a limited record of past participation. In June 2020, at the height of the coronavirus pandemic, three regional events were organised in the South, Centre and North specifically to ensure the diverse needs of precarious workers were being addressed. In addition the network has undertaken its own research into the extent of precarious work in Italian higher education and has used social media campaigns to publicise its findings and build wider support.

However, the clear novelty of *Ricercatori Determinati* is the establishment of a flexible network in which the union is one part of a wider coalition of actors.

WHAT HAVE BEEN THE KEY CHALLENGES?

Organising precarious workers presents some specific challenges that the union has had to confront. By their nature precarious workers experience unstable and erratic employment patterns. They are more likely to move in and out work or to be forced to move between institutions (or to work at multiple institutions simultaneously). This instability in employment is reflected in commitment to the network as high turnover in the workforce is mirrored in the experience of network activists. Building up a stable cadre of activists in such a group brings specific challenges for organising.

It is also important to recognise the diverse interests and experiences of precarious workers with significant differences reflecting divisions of age, gender and geography. For example, the experiences (and interests) of older precarious workers who have spent many years on such contracts can be very different to those of younger workers. Similarly, Italy remains scarred by a deep geographical divide in which the experience of employees in Southern universities is often different, and typically more difficult, than those working in the North. Seeking to reconcile these sometimes competing differences has been an important task for the network, but a difficult one. Considerable effort has been put into formulating demands in such a way that they are able to unify diverse groups and interests. One reflection of this was a manifesto prepared by the network that carefully sought to reconcile diverse interests in order to build maximum unity.

WHAT HAS THE UNION LEARNED?

FLC CGIL's involvement in the *Ricercatori Determinati* network has highlighted a number of key learning points:

Working with networks can help support engagement, especially where workers do not automatically see the trade union as the solution to their grievance. However, such work requires careful management. It can be easy for the union to dominate other participants but it is important to avoid this. Building trust and confidence requires the union to demonstrate it is an equal partner and willing to listen and genuinely co-operate. The benefits of such alliances are only realised when the network is underpinned by the necessary trust. This has to be worked for, and earned, over time.

Furthermore, the union itself must create the space in its own organisation to take precarious workers seriously. Given all the competing demands in the union it is easy for the marginalisation experienced by precarious workers in the labour market to be replicated in the union. This has to be consciously avoided to prevent it happening unconsciously.

HOW HAS THE INITIATIVE HELPED BUILD THE UNION?

FLC CGIL is clear that its involvement in the *Ricercatori Determinati* is based on a principled commitment to engage precarious workers in a collective struggle to tackle the problems they experience in their work. The network is not in any way a 'Trojan Horse' intended to draw people into union membership. The success of the network depends on the union's involvement being transparent and its motives being trusted. In this sense participation in the network by FLC CGIL is considered a long-term strategy to help tackle particularly difficult problems of union organising. Union officers can see benefits of this way of working, most obviously in terms of the growth of new '*determinati*' groups in a number of universities, but it is recognised that the work of the network is a '*slow burn*'.

CASE STUDY 4.2

Union: Zwiazek Nauczycielstwa Polskiego (ZNP) Poland.

Membership: represents teachers and other education personnel across pre-school, primary, secondary, higher education and research.

The case study: *The Academy of Young Members*

WHAT WAS THE PROBLEM TO WHICH THE UNION WAS RESPONDING?

In common with many trade unions, and particularly unions in post-Soviet societies, ZNP was aware that its membership base and activist profile was ageing. Young teachers were poorly represented in the union. For example, before November 2019 the union's General Board (76 members) had only three people aged under 36 years and in the Presidium (22 members) there were none aged under 36 years. Of the union's five standing committees only one person in one committee was under 36.

The union recognised that it was imperative to address this issue both to ensure that young members' concerns were being adequately addressed and to ensure the long-term sustainability of the organisation.

WHAT DID THE UNION DO?

ZNP established the 'Academy for Young Teachers' (AMZ) (with assistance from sister unions in Germany, Norway and the Netherlands). From the outset young members worked with senior colleagues and international partners and were fully involved in planning the Academy.

The Academy is open to all ZNP members aged 37 years or under and aims to develop young ZNP members as leaders in their union branch, school and community. Each local District (Voivodship) are allocated two places at the AMZ. The Academy programme includes three training events of three days, weekly training at ZNP education centres, a five-day residential event in Berlin and a series of self-directed activities supported by a mentor.

The content of the programme has three elements that focus on developing participants' pedagogical and professional skills, enhancing leadership skills for trade union organising and giving participants a broader understanding of global education policy and how that links to policies and issues faced by teachers and other education personnel in Poland.

Through their involvement in the project young members identified a need to 'shift the language' used by the union and took direct responsibility for redesigning communications aimed at their peers.

WHAT HAVE BEEN THE KEY CHALLENGES?

A key challenge for participants was to find the time for what was a substantial commitment. Unpopular school reforms had driven up workload and school leaders were also reluctant to grant release time to young teachers.

A further issue that the union encountered was some organisational resistance from existing union officers who did not value the support being provided to younger members but also saw this as a threat to their own status in the union. This needed to be patiently and carefully overcome. It was generally a rare occurrence but securing the support of local branch officials was identified as an important issue that needed to be addressed.

Finally, the union needed to confront the perceptions of young members who did not always believe the union was capable of being the type of organisation they wanted it to be. Shifting this thinking was a key purpose of the programme, but in order to encourage engagement in the first instance it was necessary to overcome young members' own prejudices and stereotypes of the union.

WHAT HAS THE UNION LEARNED?

The Academy initiative highlights the importance of creating spaces for self-organisation, together with appropriate resourcing. The project has encouraged young members to organise together and has provided them with resources and an opportunity to work collaboratively. This self-organising has involved a coming together of both informal and formal structures. The informal structures include the networking opportunities in the Academy and the social capital it helps to build between peers. However, these spaces also connect with more formal structures including the establishment of a Youth Committee (*Klub Młodego Nauczyciela*) in 2016 in which the Committee President is automatically allocated a seat on the ZNP Executive Board.

Members of the union believe the development of the Academy has helped the union better understand the specific needs (and perceptions)of young members and these are now better reflected in union policies and practices. The union has also learned more about the skills that younger members can bring to the organisation and how these can make a

substantial contribution that was not being made use of previously. Crucial to the success of all these developments was the inclusion of a mentoring component in the programme.

Working with, and learning from, others was seen as fundamental to the project as was building into the programme a culture of evaluation and self-reflection.

HOW HAS THE INITIATIVE HELPED BUILD THE UNION?

There is clear evidence that the Academy is helping to develop a new, younger tier of activists in ZNP. The union reports that several alumni of the Academy have progressed to take on key roles in the trade union particularly at local branch level. These young teachers and other education personnel have sometimes developed local campaigns and have produced their own campaign materials aimed at younger members. Several members have organised their own local training events for other young teachers. They have also undertaken their own research to better understand young teachers' priority issues and how they perceive the union.

ZNP's younger members featured prominently in the union's historic 19 day strike action in 2019, and the union deliberately ensured younger members had a key role when presenting to the media. Although the strike was ultimately not successful it has helped connect young teachers and other education personnel in the teachers' union with wider social movements such as the women's movement and the Polish '*Youth Strike 4 Climate*'.

- In 2019 several of the Academy's graduates became members of a working group, which developed ZNP's programme for the next five years

- Academy members established a new Young Teachers' Club (Youth Committee)

- Young members are now on the union's main Board and are represented on all of the key standing committees.

- Two graduates have become Vice-Presidents of large Voivodships (large regional structures) and after elections in 2019 young members have assumed leadership roles in more than 100 of ZNP's 1292 branches.

ZNP recognises these are initial steps but sees progress as substantial and irreversible. The Academy is seen as central to bringing about important cultural change in the union.

ORGANISING THEME #5

ORGANISING WITH COMMUNITY: BUILD ALLIANCES AND COALITIONS

There is nothing intrinsically new or novel about trade unions working together with others, within and outside the wider trade union movement, to help secure their objectives. For many years education trade unions have been active member of their confederations working with labour unions beyond education. Many trade unions have long traditions of working with organisations in civil society. However, Ibsen and Tapia (2017) make clear that there is increasing evidence of trade unions working in this way in order to build the necessary political power to make change happen.

However, what is equally clear is that coalition building is often easier to argue for than it is to execute. In practice coalition building is complex requiring time to develop trust and forge consensus. Achieving the latter can require compromise and again these can be complex processes to navigate.

Building alliances across education trade unions is clearly important but in a policy space such as education where employers are responsive to public opinion it is seldom sufficient. There is therefore a tendency to seek to build alliances beyond trade unions representing the same sector. Here it is important to distinguish between two different types of coalitions. First is the type when a union or unions seeks to win the support of allies to whatever the cause it is championing. Here the union seeks to convince others that there is common cause around an issue and by building up a network of allies it hopes to increase political leverage. Such an approach (sometimes referred to as 'vanguard coalitionism') may be effective in the short run but the danger is that partners in the alliance can feel exploited – expected to support the cause on terms entirely determined by the union. Such alliances tend to be short term and difficult to sustain.

An alternative approach to coalition working is to work in ways that ensure that goals are commonly agreed in the first instance, or indeed where unions are willing to act as coalition partners on issues where the agenda is largely determined by others. There are increasing examples of this type of activity but perhaps the stand-out case remains that of the Chicago Teachers' Union that actively mobilised around the issues faced by students in their communities (poverty, racism, poor housing) in order to connect the crisis facing public schools with wider struggles (see McAlevey, 2016).

In this section the two case studies offer interesting examples of different types of alliances and coalitions. In Spain FE.CC.OO works with a wide range of trade unions and civil society organisations in an on-going 'platform' to organise around broad questions of public education. In the second case, Acod Onderwijs from Belgium offers an example of how members of the union engaged with the Youth Strike for Climate to build a movement for climate justice.

CASE STUDY 5.1

Union: Acod Onderwijs (Belgium)

Membership: The union represents all sectors of education workers from early years, through schools to vocational, adult and higher education.

The case study: Alliance building with *Youth for Climate Strikes*

WHAT WAS THE PROBLEM TO WHICH THE UNION WAS RESPONDING?

In 2019 the youth climate strike, or *Fridays for Future* campaign developed into a global movement initiated by Greta Thunberg. This movement gained particular traction in Belgium where the movement had its own local leader, Anuna De Wever.

The campaign clearly had a strong student focus, rooted as it was among students in schools and universities. For Acod Onderwijs the union had a strong commitment to supporting environmental campaigns and many of the union's members were eager for the union to participate fully in the youth climate strikes.

The union therefore had to decide how to support the students' campaign while navigating a number of complex issues for the union, including whether or not to formally support strike action by its own members. The union also had to secure unity around an issue that many members felt passionately about, but which some members did not necessarily regard as a legitimate trade union concern.

WHAT DID THE UNION DO?

From the outset the union was concerned to make sure the campaign was led by the young people and not dominated by organisations, such as trade unions, that possess relatively large organisational resources and so can easily, although inadvertently, take over. The union was clear that the movement had come onto the streets from outside the union and was the initiative of young people. As one union official indicated clearly – '*it was a movement of the youth*'.

The union immediately reached out to Anuna De Wever to ask how the union might show its support, but the union was always eager to ensure that student leadership of the movement was respected. Hence its commitment to not undertake actions that had not

been invited by the students as the student movement sought to retain its autonomy. This provides a part of the explanation as to why the union did not formally take strike action (which was also made difficult by Belgian legislation which requires a legally determined trade dispute to exist in order for a strike to be legal).

Rather the union actively supported members to participate in the youth strikes based on the individual decisions of members, and as a consequence large numbers of union members took part in the youth strikes. In some cases this involved travelling to Brussels with students but in other cases Acod Onderwijs members worked with young people to organise mobilisations in local communities. Members made particular efforts to connect the student strikes with poorer and migrant communities which were often under-represented in the national demonstrations.

Finally, union members undertook extra classes with their students that both explored environmental issues, but also considered questions of protest and democratic citizenship.

WHAT HAVE BEEN THE KEY CHALLENGES?

The union recognised that the climate strikes were a complex issue and required careful navigation through a number of contentious debates in the organisation.

A key issue for the union was to work to support the students, to recognise their leadership of the campaign and not to appear to dominate or take over. The union was keen to provide assistance and participate but was conscious of the need maintain a supportive, and secondary, role. It was recognised that this was not always an easy or natural role for a union to adopt.

WHAT HAS THE UNION LEARNED?

Acod Onderwijs identified the need to be able to respond quickly and flexibly to rapidly changing developments. This can be counter-intuitive to the way unions traditionally work. Bargaining cycles, where they exist, are by their nature predictable in both form and timing. Trade unions can plan their own work and campaigning around these cycles. In the case of the climate strikes events unfolded rapidly and sometimes in unpredictable ways. Single issue campaigns, such as those engaged in environmental movements, are often able to be more agile.

For Acod Onderwijs there was a need to be able to both respond quickly, but also to ensure there was time to properly debate issues and secure consensus in the union. As indicated, the issues were complex and contentious in the organisation and so allowing proper space for internal discussion was considered essential. Fully engaging the membership and allowing all voices to be heard was seen as critical to winning internal support in the union on climate issues, as well as building a wider movement to win support for policy-makers.

In such circumstances the role of social media was also crucial with the union using multiple channels to ensure effective communication both outwardly and to the union's own members.

HOW HAS THE PROJECT HELPED BUILD THE UNION?

Acod Onderwijs's involvement in the youth climate strikes was a difficult issue for the union. Many members cared strongly that the union supported the strikes fully, while some members did not believe the issue was a legitimate union concern. The union absolutely recognises that climate issues are a key trade union issue, and that concerns about climate will only increase in the period after the coronavirus pandemic. The union has a number of initiatives to continue to campaign on this matter, including a project with ETUCE, and to connect and engage with members in the union who prioritise this issue.

The union is also undertaking a separate review of its own structures to ensure that its vision for the future, and its rules and organisation to ensure democracy and participation in the union, are fit for purpose in a changing environment. The union believes that its work on the climate issue, and its experience of working in partnership with other types of organisations and social movements, can provide helpful lessons that can inform its own approach to change and renewal.

CASE STUDY 5.2

Union: Federación de Enseñanza CC.OO (FE.CC.OO), Spain

Membership: The union represents all sectors of education workers from early years, through schools to vocational, adult, higher education and research.

The case study: *Plataforma Estatal Por La Escuela Publica* (the National Platform for Public Education)

WHAT WAS THE PROBLEM TO WHICH THE UNION WAS RESPONDING?

Public education in Spain has suffered many problems since the economic crisis, with particularly deep cuts enacted during the years of austerity. These cuts were made to an education system that was already considered to have serious failings, most clearly in relation to social inequalities.

Trade unions had sought to challenge the attacks on public education, but with only limited success. Some believed that trade unions on their own lacked sufficient economic and political leverage to resist the attacks on the public education system, and public education workers. Rather there was a need to build a broader coalition of support.

WHAT DID THE UNION DO?

In 2012 FE.CC.OO played a key role in establishing the *National Platform for Public Education.* The Platform was formed as a coalition of trade unions and civil society organisations representing education workers, parents and student groups. In the national platform there are 10 groups.

The platform intentionally operates as a loose network of its member organisations. There is no constitution or written rulebook. Rather decisions are arrived at by discussion and consensus. Sometimes it is agreed that decisions require the agreement of all parties and sometimes decisions are made by a majority. If a group or groups actively opposes an action the platform may still proceed, but only in the name of those organisations supporting the action.

Platform members meet to discuss the issues the platform will campaign on, and to agree the actions it will promote in support of the actions. The Platform has been able to frame

itself as representing the 'education community' and is often presented in this way in the media. It has been successful in mobilising around a number of key campaigns and issues although support depends crucially on the nature of the issue. As such its activity has ebbed and flowed depending on specific issues.

The national platform is mirrored by the existence of many local platforms. These often include a broader range of interests including community groups and political parties (there are no political parties involved in the national platform). Local platforms do not have a formal link to the national equivalent but exist as independent autonomous organisations. Lack of clarity around this relationship can cause some difficulties and is an issue that has to be carefully navigated.

WHAT HAVE BEEN THE KEY CHALLENGES?

FE.CC.OO considers that working with the platform brings a number of benefits, not only in terms of broadening the coalition of support in favour of public education but also presenting the campaign for public education as dynamic and rooted in a form of social movement politics (rather the more bureaucratic tradition of the trade union). However, the union identifies a number of challenges that flow from working in this way:

The most obvious challenge is that coalition working requires time, resources and commitment. Reaching agreement can be a lengthy process and it is essential to make the required resource investment.

It is also recognised that the process of securing consensus can limit the potential to make radical demands as reaching agreement often results in parties coalescing around more limited goals. Inevitably the union must evaluate the trade-off between having to compromise around key issues against securing much broader support for the final position.

Finally, it is acknowledged that the platform has worked at its best when there has been a clear issue to mobilise *against* (such as funding cuts) but it has found it more difficult to campaign around presenting a positive case for change. As such the platform highlights the well understood problem of social movement campaigning as it seeks to move from the politics of protest to the politics of possibility.

WHAT HAS THE UNION LEARNED?

FE.CC.OO values the impact the platform has had on public opinion and on the wider presentation of the union's campaigns. One officer argued that the platform not only enhanced the union's legitimacy in wider civil society, but it also had a positive impact on union members' perceptions of the union. Trade union mobilisations, including strikes, appeared more widely supported by members when conducted in the name of the national platform.

However, for the union's involvement in the platform to work effectively it was recognised that commitment from the political leadership of the organisation is essential. The process of securing consensus is necessarily complex, and often requires intricate intra-organisational bargaining (bargaining between allies). For those engaged in this process to be able to work with the necessary flexibility then support and trust from the union's leadership is crucial.

Finally, members of the platform have learned that they are most productive when they focus on issues around which there is substantive agreement in the first instance. Efforts to try to secure consensus on issues that are more contested rarely lead to a breakthrough but can absorb large amounts of limited resources. This has been distracting for those involved and has deflected the platform from useful and often urgent action.

HOW HAS THE PROJECT HELPED BUILD THE UNION?

For FE.CC.OO participation in the national platform is a long-term project focused on working with allies to reframe the narrative around public education and the need to invest in quality public schools. The focus has never been on union building *per se* although union officers believe participation in the platform has enhanced both the credibility and effectiveness of the union and its campaigns. As indicated, the union believes it has been able to mount more effective mobilisations, with greater member support, by virtue of the union being part of the platform. Officers speculate that this may have had an indirect positive effect on membership recruitment.

It is also believed that participation in the platform may have helped reframe the narrative about education trade unions more widely. One official commented that unions were often perceived as slow and bureaucratic compared to other organisations in civil society that compete for the attention, and time, of young people eager for change - '*we need another image and different ways of working*'. Working in a broad coalition alongside other progressive groups may offer a model of what that different way of working can look like.

ORGANISING IN A CRISIS

This research project commenced in 2018, ten years after the economic crisis that still casts its shadow on public sector workers a decade later. In 2019 the climate crisis achieved an unprecedented level of interest when a global movement of young people took to the streets to demand societal action on the environment. In 2020 a global public health crisis spread across the world in a matter of weeks. One consequence of which was the physical closure of many schools, colleges and universities across the world - a development that at the start of the year would have been beyond anyone's imagination.

Moments of crisis are by their nature unsettling. Not only is there often short-term upheaval, combined with the potential for great personal cost, but outcomes are uncertain. Consequences may be profound, but also long lasting. Crises are, therefore, moments of societal insecurity, which powerful vested interests often seek to exploit (Klein, 2008). They are also moments when stark choices are posed about the future - what should the future look like and how should that future be determined? Whose voices count? Such moments present trade unions with an extraordinary challenge, but also an opportunity because it is at moments of crisis that the values of social solidarity and social security can be reasserted and connections with members can be stengthened (Vandaele, 2020).

In this report we present two case studies of education trade unions responding to the coronavirus pandemic and the impact on their members - Gewerkschaft Erziehung und Wissenschaft (GEW) in Germany and the National Education Union (NEU) in the UK. Both case studies illustrate how education trade unions responded strategically to events that were completely unanticipated. Both cases also highlight the possibilities, and the limitations, of new forms of 'digital activism'. The importance of new technologies was well established before the pandemic, although often experienced as a problematic area for trade unions. During the pandemic the use of new (and sometimes previously not used) technologies grew considerably. Education trade unions were not only using social media for communication but also using technology to conduct, for example, formal governance meetings, union training and conference events. In some cases this clearly extended the 'reach' of the trade union and made the union more accessible to those who face obstacles to participation. Those with caring responsibilities, or living in more remote areas, provide obvious examples. However these experiences also highlighted the limits of technology with unequal access to technological infrastructure a common problem. Perhaps most importantly the pandemic illustrated that technology must support organising but cannot be a substitute for organising, which remains fundamentally about human interaction (Education International, 2020). Technology can help convey messages in attractive ways and can help connect teachers and other education personnel within and beyond the union (Pasquier and Wood, 2018) but it cannot substitute for the necessary personal work required to build relationships and trust and shift thinking. Both the case studies presented highlight these issues.

CASE STUDY 6.1

Union: Gewerkschaft Erziehung und Wissenschaft (GEW), Germany

Membership: Represents teachers and other education personnel in schools, higher education and research, early childhood education, vocational training and adult education.

The case study: GEW's response to Covid-19 and the impact on schools

WHAT WAS THE PROBLEM TO WHICH THE UNION WAS RESPONDING?

In March 2020 schools in Germany were closed in response to the Covid-19 pandemic. Due to Germany's federal constitution decisions on matters relating to school closures and subsequent re-openings are taken separately in each of 16 *Länder* (regional government areas).

As in other countries, GEW's role has been to protect the health and safety of members and to ensure any wider re-opening of schools is undertaken with full union agreement. The problem GEW faces is that social dialogue has to take place with the relevant administrations in each of the 16 Länder and the quality and effectiveness of this dialogue can vary significantly between *Länder*.

Although policy relating to schools is the responsibility of individual *Länder* a committee of Education Ministers does meet and seek to secure co-ordination in policy. In June 2020 the Chair of the Education Ministers announced schools would return in September on a 'regular basis', ie 'as normal'. This announcement was made without any consultation with relevant unions.

WHAT DID THE UNION DO?

GEW's task has been to protect its members' interests regarding occupational safety and health issues while also ensuring it had the political leverage to have a voice in decisions about school re-opening plans. This involved a number of specific actions.

The union undertook major media and public relation activities which simultaneously focused on members, non-members and the wider public. A key purpose of these activities was to provide information to members and the public recognising the high levels of anxiety that prevailed and the appetite that existed for health and safety information

and about related rights at work. Publishing legal expert reports on health and safety issues related to the workplace in the different education sectors that underscored the core competences and claims of GEW was significant in this context. Public relations work and online communication deliberately adopted two approaches. First was material that focused on providing important factual information, equipping members with what they needed to support them in their work (the union's 'Q&A' webpage achieved a record 'hit rate'). Second was material that intentionally had a more emotional appeal – emphasising the importance of social solidarity and the role of the union as a source of support.

Alongside GEW's very visible media presence (reflected in a high volume of interviews for print media, TV and radio), the web presence and social media became more important and the union undertook targeted online advertising with links to online application forms. The most impactful messages were those that indicated '*We represent you in your profession and on education policy matters*' and '*In times of crisis you need a strong union'.* Online materials that made use of personal testimonials and 'stories' of members had a particular impact online, especially in video format.

The message of solidarity in a time of crisis was also linked to the campaign of the wider trade union movement (through the confederation DGB) which, for example, organised a major online May Day event around the theme of #SolidarischNichtAlleine ('Solidarity, Not Alone').

Alongside working with other unions GEW developed an effective alliance with the federal parent's council while also working actively with scientists and experts on labour and health protection issues.

The union also made full use of technology in order to communicate and engage its own members and activists. Examples include the use of online polls, surveys and petitions to identify members' views, but also as a tool for campaigning. Videoconferencing was used extensively to support activist networking and communication although use of large online meetings was more tentative.

Finally, the union stepped up its international solidarity and advocacy work recognising the global nature of the pandemic, for instance reaching out to major global actors like the World Bank and International Monetary Fund. During the coronavirus crisis this also focused on a campaign against child labour and advocacy for the rights of refugees.

WHAT HAVE BEEN THE KEY CHALLENGES?

There was no doubt that the physical constraints of online working presented difficulties for the union. This was due to variable access to resources (hardware and software) but was also dependent on the skills and experiences of activists to make the best use of the technology.

Internal communication was often considered a challenge, especially given the pace of developments.

The union's campaigning activities were seen as effective, and the alliance with parents' groups provided an important source of political capital but the union constantly had to challenge negative media coverage that criticised (and misrepresented) teachers' attitudes about returning to work.

WHAT HAS THE UNION LEARNED?

For GEW the coronavirus pandemic has highlighted the possibilities of technology as both campaigning and organising tools. This is not denying the importance of personal contact and many more traditional methods of campaigning but technology appeared to make engagement and participation easier for union members. It may well be that the salience of the issues played a role in driving people towards the union but technology also appeared to lower the barriers to participation. For example, attendance at online meetings increased considerably with some evidence that those participating may have been less likely to engage in the union otherwise (including those with caring responsibilities, disproportionately women, or those who live long distances from meeting locations). One union official suggested that younger members can find traditional union structures a disincentive to engage and some technologies may be more attractive in some cases. New mechanisms for engaging members and involving them in democratic decision-making may be opening up.

HOW HAS THE EXPERIENCE HELPED BUILD THE UNION?

The union clearly experienced high levels of member engagement during the period of the pandemic, with hugely increased media attention and also accessing of the union's online materials. Physical distancing certainly increased members engagement online. This often extended beyond the passive 'consumption' of information (important as that is) but also extended to active engagement in online actions and mobilisations (as interaction rates on Facebook demonstrated).

Moving activities online clearly posed difficulties, but it also created opportunities. For example, GEW's youth conference ('*GEWolution 2020*'), which it holds every four years, had to be re-purposed as an online only event. In 2020 the event was titled 'Gesellschaft. Macht. Grenzen.' ('Society. Power. Borders') and involved a committee of young activists organising the conference. Moving the event online allowed it to be opened up, using live streaming technology to make the event more accessible to a wider audience. Involving a committee of young members as organisers of the conference, supported by GEW staff, also ensured the event had a wide appeal to GEW's younger members.

CASE STUDY 6.2

Union: National Education Union (NEU), UK.

Membership: The union represents teachers and other education personnel, from early years through to further education.

The case study: The NEU's response to Covid-19 and the impact on schools

WHAT WAS THE PROBLEM TO WHICH THE UNION WAS RESPONDING?

As in much of the world, due to the Coronavirus pandemic the UK government effectively closed schools in England to the vast majority of students in March 2020. Only the children of key workers and vulnerable children were able to physically attend school. Decisions on these issues in the UK are the responsibility of the administrations of the individual nations of the UK with decisions in England made by the national government.

Government handling of the crisis was controversial from the beginning. Among education workers anxiety levels rose quickly as virtually every aspect of the government's management of the pandemic in schools appeared to be mishandled. Particular concerns were raised about when, and under what conditions, any wider re-opening of schools would take place.

In England these problems were exacerbated by a school system that had become highly fragmented with governance transferred to a type of quasi-market model rather than one based on the co-ordination of national and local government.

WHAT DID THE UNION DO?

Understanding the risk that the UK government would not engage in meaningful discussions with trade unions on issues such as wider school re-opening, the NEU recognised the need to mobilise broad political support among members and the wider public in order to achieve its aims. It therefore immediately treated its response to the Covid-19 crisis as a union campaign, intended to seize the initiative and shape the debate. The campaign was based on three dimensions:

- A traditional trade union dimension focused on the health and safety of members.
- An education dimension focused on the impact of the crisis on teaching and learning – in the immediate and longer term.
- A social dimension focused on the needs of students and their communities.

Practical actions involved providing key information for members, although this was developed as a 'bottom up' process in which multiple online meetings were used for members to identify the key issues (recognising members as the experts in relation to their own contexts and institutions).

Workplace representatives were seen as the key figures in the campaign as these were the only people, realistically, able to have the negotiations at an individual school level about the safe wider opening of a school. In a hyper-fragmented school system the workplace union representative became the lynchpin of the campaign.

The union developed a number of campaign strands that were based on clear, powerful and evidence-based messaging. For example, the union developed '#FiveTests' to evaluate if a safe return to school was possible and also presented a 10 point 'National Education Recovery Plan' that was intentionally counter-posed to the government's absence of any plan. These messages were promoted widely through social media, often gaining considerable amplification through activist-led 'twitterstorms'.

Throughout the campaign the union linked immediate and pressing concerns around safety with wider questions about education policy. For example the pandemic resulted in the cancellation of standardised testing and school inspections, which allowed the union to critique the role of high-stakes accountability mechanisms in the English school system. In a similar vein the government's chaotic management of the crisis allowed the union to highlight the consequences of market-driven fragmentation and the need to replace this with national co-ordination.

Finally, the union placed considerable emphasis on building alliances with partners and worked very effectively with other education sector trade unions, parents' groups and the scientific community.

WHAT HAVE BEEN THE KEY CHALLENGES?

Developing a co-ordinated union response in a multi-union and highly fragmented system was considered a major challenge. This correspondingly focused attention on the importance of school-based union representatives but in the primary school sector (where the wider re-opening of schools was initially targeted) the density of representatives (% of workplaces where there is a representative) was lower. This required significant workplace representative recruitment.

In the coronavirus pandemic the scale of the health crisis, and the pace of the political crisis, were both extraordinary and placed enormous pressure on the union's resources. These challenges were compounded by the experience of both staff and activists having to adjust to working from home. The union quickly identified a need to simultaneously centralise staff resourcing (to ensure everyone was focused on responding to the pandemic) and decentralise activity (to draw on the resources of a mass membership).

WHAT HAS THE UNION LEARNED?

As a result of the union's experience of the pandemic a number of key learning points were identified:

The pandemic highlighted the need to understand the specific issue and its context – the particularities of the conjunctural moment. The Covid-19 crisis connected deeply with teachers and other education personnel as the safeguards around the wider opening of schools became, literally, a question of life and death. However, it was also an issue that was completely unanticipated. As a consequence the union found itself in a huge campaign, but one conducted on terrain over which it had had no control. The challenge for the union was to adapt its own strategy to an issue of critical concern to members, but which it could not have reasonably predicted. Understanding, through rigorous analysis, the relationship between what the union has little control over (the 'crisis') and what it can control (union strategy and response) was seen as key.

Linked to the above was the need for the union to be able to be agile in the face of fast-moving developments. Resources were rapidly redeployed with all efforts focused on pandemic related activity. For example, union training was quickly moved online, in particular the health and safety programme that was essential at that moment.

Finally, the campaign clearly highlighted the possibilities provided by technology – not only for communicating key messages but for networking and connecting members and activists. Scores of online meetings were organised, by the union nationally and locally, but also by school union representatives and groups of activists. These opened up opportunities for connecting with members, but they can also undermine existing structures and this needs to be recognised. It is also important to appreciate how technology supported communication at a time when communication was difficult, but what built the union's campaign was myriad activists and workplace representatives making (virtual) contact directly with their colleagues.

HOW HAS THE PROJECT HELPED BUILD THE UNION?

Despite the challenges of a hyper-fragmented school system, and the unpredictable nature of the crisis, the union was well placed to respond to developments. For many years the union had been adapting strategically to a much more fractured environment, principally by prioritising the work of school representatives - seeking to both recruit and develop more school representatives and to deepen workplace organisation.

The combination of crisis, strategic union organising and the creative use of technology ensured the union was able to mobilise quickly and effectively at the key moment. One obvious illustration of this was the participation of very large numbers of members in online meetings. In one instance a single open online meeting for members hosted by the union's joint general secretaries had more than 20,000 participants. This increase in engagement was also seen in an increase in membership as 50,000 new members were recruited to the union. Perhaps even more significant however was that the union recruited 3,500 new workplace representatives and was quickly able to provide them with advice and guidance they were able to apply in their own school context - dramatically increasing the visibility of the union to members and non-members alike. Recruiting more workplace representatives, but crucially supporting and developing new representatives to be able to take on a more ambitious role in organising their colleagues, is seen as key to further union building.

5. CONCLUSIONS

In this report we have identified some of the significant ways in which education workers have experienced changes in their work in the recent past. There is no doubt that many of these developments can be linked to the consequences of the 2008 economic crisis and the long shadow it has cast over public services generally, and often education in particular. However, it is important to recognise that many of these developments were clearly evident before 2008 and have simply been accelerated by the crisis. Furthermore, a narrow focus on the impact of economic crisis can similarly focus attention only on the economic dimensions of the work of teachers and other education personnel – pay, pensions and precarity for example. What is clear from both research evidence and the personal accounts of teachers and other education personnel is that their work has also been subject to increasing external direction and monitoring with a closing down of the space for exercising professional judgement. We do not underestimate the extent to which these experiences can differ between different contexts but it is also necessary to acknowledge common trends and developments.

Given these developments, it would be reasonable to expect workers to look to their trade unions to protect their interests and to defend and extend their right to determine key aspects of their employment experience. Clearly education trade unions perform an invaluable function in this regard. However, what is equally clear is that this task has become more difficult. Although education trade unions have by and large not suffered the problems that have confronted trade unions in other sectors nor have they been immune to the problems of declining membership, participation and influence. Again, we reiterate, that these phenomena can be experienced very differently in different jurisdictions, but we contend that no education trade union has been able to avoid completely many of the issues we raise in this report.

Members of individual unions must determine for themselves to what extent the issues highlighted by this research pose a challenge for them that demands a response. That response will be shaped by the history and culture of individual unions and the specific issues each faces in their own context. What we hope is that this report can stimulate a process of critical reflection and help inform collective discussion as education trade unions consider the challenges that confront them, now and in the future, and how best to respond to them. In presenting these concluding remarks we reiterate that there is no single roadmap to renewal. Research relating to revitalisation strategies is strong on what unions are doing, but much less strong on what difference it makes. In this relatively small scale project we make no claim to evaluate the relative effectiveness of different strategies but rather we offer a way of conceptualising renewal, and provide a number of case studies, that can help inform processes of reflection. In the final sections of this report we draw together material generated throughout the project to offer some overarching themes and conclusions and provide an analytical framework for thinking about what a transformative education trade unionism might look like.

5.1 REFLECTIONS ON UNION RENEWAL – THE IMPORTANCE OF PURPOSE AND PROCESS

THE CENTRALITY OF PURPOSE

At the heart of any union renewal process is a focus on the fundamental purpose of trade unionism. Union renewal is not about building the union as an end in itself, but focuses on building the union because of what the union is capable of doing when its members act collectively. The key purpose of education trade unions is to bring about change and improvement in relation to the core concerns of education workers, but to do so in the broader context of demands for an education system that meets the needs of all in society. Bernaciak et al. (2014) argue that clarity about purpose, and the ability to articulate such purpose, is key to unions developing resources of 'moral power':

> **"**
>
> *the central purpose of trade union action can be presented as the pursuit of social justice, the struggle for economic and industrial democracy, the defence of humanity and autonomy against precariousness and stress at work, the search for opportunities for self-development in employment. All share a master narrative: trade unions are collective means for workers to defend their human rights against the dehumanising imperatives of profit. (Bernaciak et al., 2014, p. 79)*

We would argue that for education trade unions the basis of this 'moral power' resides in unions' ability to develop, articulate and campaign for a vision of high quality public education based on public service values of democracy and rooted in a commitment to social justice.

The value of union renewal analysis is that it places purposes and values at the heart of the project, but it also questions how the organisation can best achieve its objectives. The focus is always on outcomes and processes. Crucially the focus on process recognises that key to achieving change is the question of union power and how to build it. In whatever context a union functions the extent to which it is able to progress its agenda depends ultimately on its ability to mobilise power resources in the form of union members taking collective action. A union renewal analysis never takes such power for granted but is always actively seeking to build it. This is in part by developing collective action in the

workplace, where union members' experiences of work are formed and shaped, but as we are arguing, it must also involve connecting workplace concerns with the wider community and society's aspirations for high quality public education. Co-constructing such coalitions contributes significantly to shifting the balance of social forces in society that in recent years have been intentionally re-balanced at the expense of organised labour.

Union renewal therefore is fundamentally about building union power by building solidarities - between union members, between union members and those not (yet) in the union and between union members and wider society. This is not about an abstract solidarity operationalised through motions that are passed but about which the vast majority of members know nothing, but is about making solidarity real and meaningful in the daily lives of teachers and other education personnel. It is manifest through members' active engagement in the union, and through the actions members take together to bring about change. As a process focused on change it seeks nothing less than a transformation in the way public education systems are resourced and organised so that those who work in them, teachers and other education personnel, can provide education that meets the needs of all in society. However it recognises that in order to shape change in a world where change is determined by powerful interests then trade union organisations must also change. Transformational change requires a transformative trade unionism. For this reason the question of 'what is the union for?' cannot be separated from the linked question of 'who is the union for?' (Marino et al., 2019). This is not simply a technical question about membership categories and bargaining groups, but also forces unions to consider whose interests are prioritised in the union's bargaining agenda and wider campaigning priorities.

THE IMPORTANCE OF PROCESS

Our notion of transformative trade unionism is reflected in many of the case studies in this report which provide examples of serious and substantial organisational change. Interviewees often emphasised that such processes were both complex and lengthy. Here we present three renewal processes that emerged from the case studies as often being pivotal to making change happen.

ANALYSE THE CONTEXT AND DEVELOP THE DIRECTION

Any process of union renewal needs to be based on a rigorous analysis of the concrete situation faced by the union and an open and realistic assessment of the challenges that present themselves. This involves assessing the wider political, economic and social context as well as specific trends as they apply to education and the changing nature of the work of teachers and other education personnel. Such an assessment works best when it is evidence informed making use of both externally and internally generated data.

Developing an approach to future planning that both engages with research, and is evidence-informed, can often help to identify strategic directions. For trade unions undertaking or commissioning research is costly and may be considered prohibitive, but it may still be possible to build relationships with relevant researchers that can increase access to already existing studies. In some cases such researchers may be union members, or indeed activists in the union.

Central to analysing and understanding the context is the need to develop a constructive culture of self-evaluation that makes possible the open assessment of organisational strengths and weaknesses and areas of growth and decline. Such an approach must necessarily be data-informed in a way that ensures decision-making is guided, but not determined, by evidence. Detailed membership data offers one example of how such data can be used. In the survey it is clear that many unions analyse membership data at a whole organisation level, however several case studies suggested this became more useful when the data was more finely grained - allowing analysis by types of members, or even workplaces for example.

Use of these methods can support effective horizon scanning as unions seek to anticipate the key issues that are likely to confront them in the future. Central to this process is the need for a long-term perspective. Trade unions are typically relatively resource-scarce organisations that are constantly confronted by immediate problems that need a response. It is perhaps inevitable that a type of short-termism can predominate. Some renewal processes can happen quickly, particularly when external events can make immediate change a necessity, but it is important to recognise that deep renewal is a long-term project that requires a strategic perspective that looks many years ahead.

DEMOCRATISE CHANGE

Renewal is fundamentally a change process that requires broad support if it is to be successful. Trade unions, by their nature, are complex organisations that include elected officers at every level of the organisation, paid staff and a wider membership with varying levels of engagement in the organisation. Within these constituencies attitudes will differ about proposed changes with attitudes shaped by multiple factors from political considerations through to perceptions of personal impact and consequences.

A recurring theme in case study unions was the emphasis placed on open communication and engagement and the need to win support throughout the organisation. In all cases the need to work across all sectors of the union to bring about change was emphasised. In particular it was recognised that both key activists and union staff have much invested in the organisation and identifying and responding to their concerns was seen as critical.

Such change processes highlight the need to critically review current practices and identify all those practices that act as an obstacle to participation and engagement, recognising that many barriers to involvement impact specific types of members more than others. Within these cases studies we show examples of how unions are creating spaces, and changing structures, to break down the barriers to participation. Creating spaces,

supported by resourcing, for self-organising among groups typically marginalised both in the labour market and in the union was one form of change which in turn began to shift the culture within the organisation.

Union renewal involves 'doing things differently'. It is not about undermining existing democratic structures, but about assessing whether current structures are fit for purpose in a changed environment, and adapting where necessary in order to widen and deepen member involvement. What is clear is that there can be no union renewal which is not democratic renewal also.

EDUCATE TO TRANSFORM

Within the case studies several examples highlight the importance of trying to shift popular thinking in relation to key issues that impact union members. In this sense unions are involved in trying to educate the public about key union priorities and in many instances the intention is to shift public opinion in order to secure political leverage in the public space. Here however we go further and highlight the importance of 'shifting thinking' within the union's own membership and the wider workforce. The challenge is to persuade members, and crucially potential members, that alternatives exist, that change is possible and that change requires workers to act together. In practical terms, such acting together in this way is not possible without trade union organisation. Bringing about such a change in thinking is a ultimately a pedagogical process that requires the active intervention of the union itself. There may be moments when such shifts in thinking happen spontaneously but by definition they cannot be anticipated, and the outcomes are never guaranteed. There can therefore be no substitute for the strategic and focused intervention of the union in this type of pedagogical work.

In many of the case studies in this report education trade unions place considerable emphasis on this type of member education. In these cases unions go beyond a 'transmission model' (Kennedy, 2014) approach to member education (providing information it is considered important for members to know) and develop a more 'transformative pedagogy' (Mezirow, 1995) that transcends the constraints imposed by current discourses and involves members in the co-construction of future possibilities. It can be considered transformative in that the union recognises its own role and responsibility as a 'collective educator'.

The type of transformative education we are describing plays a key role in developing the activist base within the organisation which is foundational to building union capacity. Developing the skills and capabilities of more union members to be able to take on organising and leadership roles within the union is key to renewal. Educating activists to be able to take on this educative role, and to act as 'organic intellectuals' among the wider membership and the community, represents a key point in making union building embedded and sustainable.

5.2 A FRAMEWORK FOR EDUCATION TRADE UNION RENEWAL: TOWARDS A TRANSFORMATIVE TRADE UNIONISM

In this final section we seek to bring together a number of themes and ideas that have emerged from this project into a single unified framework (see Figure 2). This is not an attempt to present a model to be adopted in any formal sense but rather it acts as a frame for 'thinking through' renewal, and which we believe can help inform collective thinking and discussion. It is intended to be flexible so that it can be adapted to specific contexts allowing readers to decide for themselves to what extent it is relevant and applicable to their own situation and experience. The framework is based on four domains:

PURPOSE – union renewal raises fundamental questions about union purpose. What does the union exist to do? At a more prosaic level, for whom does the union exist, and how does it demonstrate its relevance not only to members, but perhaps more importantly, to those who are not members but could and should be members? How does the union relate to those in the wider community for whom education is fundamental to their quality of life and their ability to participate as active citizens in a democratic society? Looking to the future, how does the union ensure it continues to be relevant to members and potential members in a world where work is changing rapidly? Ensuring there is collective discussion in the organisation about these questions and others is key to transformation. In this report we discussed the centrality of purpose on p. 87.

PROCESSES – union renewal is about change and bringing about change in often large and complex organisations. Change is almost always contested, especially when the case for change is not widely understood. Renewal focuses attention on the need to engage multiple voices in the change process and to think hard about who gets to speak and whose voices are heard. Such processes are fundamentally pedagogical recognising that we learn to both imagine, and realise, new possibilities. There cannot be transformative change without transformative learning. In this report we have identified three changes processes and these are discussed on p. 88.

ACTIONS – the purposes of education trade unions are realised through the collective actions of members. Union renewal recognises that the building of union power through the building of solidarities cannot be left to chance but must be strategically and inten-

tionally developed. This is what we mean by 'organising' – the active process of building solidarities in order to generate action. In this study we identify five 'organising themes' or areas of activity (discussed on p. 38). While we recognise that prioritising is fundamental to being strategic we do not pose the organising themes as discrete activities that are disconnected from each other but rather we see each as essential and all as interdependent. The challenge for education trade unions is to weave these areas of activity into a coherent whole in a way that aligns with the values and mission of the organisation.

EVALUATION – union renewal recognises that the union can only achieve its purposes when it has the organisational power and capacity to make progress. There must be a recognition therefore of the need to constantly evaluate union activities in relation to the extent to which they contribute to union building. Put simply, in what ways does any activity, whatever it may be, make the union stronger? Such an approach is necessarily concerned with growing membership, but always recognises that there is no simple link between membership and power, but that power is realised when members have the commitment and skills to mobilise effectively and act. In this report we have presented a set of five tests that can help underpin the process of self-evaluation that is central to renewal (discussed on p. 36)

Throughout this project we have discussed these different ideas and we complete this report by presenting them below as a framework for thinking about a transformative trade unionism: the building of union organisations capable of shaping the future of education in Europe.

Figure 2: A framework for education trade union renewal: towards a transformative trades unionism
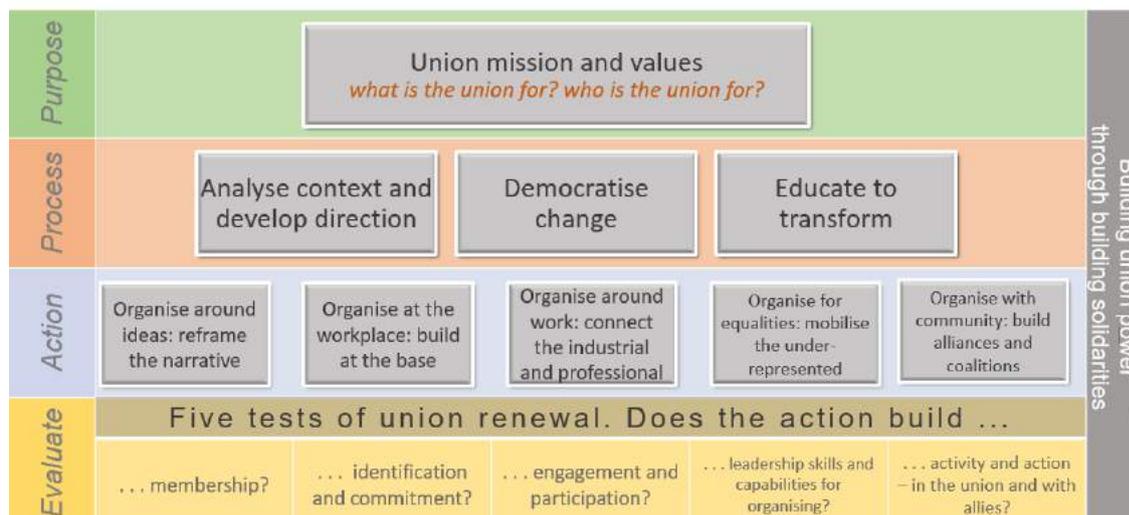
In presenting this framework we affirm that it is, and must always be, a 'work in progress' that must be constantly adapted, developed and revised by those who engage in the process of renewal.

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7. APPENDICES

APPENDIX 1: METHODOLOGY

Here we provide a brief overview of the research design that underpins this study.

Data was collected throughout the duration of the project which took place between 2018 and 2020. Much of the data collection, and all the writing up of the report was undertaken during the period of the Covid-19 'lockdown' and in many senses the project and the pandemic became intimately linked. At a practical level the project was directly impacted by the pandemic with the third workshop (for Central and Eastern European education trade unions) being conducted online. In discussion with the Advisory Group it was agreed that the project needed to respond to these developments and to incorporate them into the study because although it was extraordinary the pandemic was also a real world event that was shaping the terrain on which education trade unions had to work. In this report we have tried to capture those issues. This was possible because we were able to include questions relating to the pandemic in the survey while it was also agreed to add case studies that provide examples of how two trade unions were responding to the crisis. As a research team we would want to acknowledge the support and co-operation we received from many education trade union officials and activists when they were facing such a difficult situation.

The final report draws on data collected from four sources:

- A literature search and analysis of secondary data sets
- Analysis of discussions and outcomes from the three project workshops
- A survey distributed to all ETUCE member organisations
- Interviews with union officials and activists for the purpose of producing case studies

Further details of the workshops is provided in 'Your Turn! Workshop Methodology' and these were used to identify and discuss a range of issues that emerged from previous studies. Workshops were not used for systematic data collection but workshop outcomes were shared and discussed with the Advisory Group and used to inform and shape the project as it developed.

The survey was distributed to all 132 ETUCE member organisations in April and May 2020. A total of 66 responses were received and after duplicates were removed there were 62 valid survey returns (a response rate of 47%). Given the very difficult circumstances at that time the response rate was extremely positive. Responses reflected the full geographical area of the ETUCE region and also comprehensively covered all education sectors. A full list of survey respondents is provided in Appendix 2. For some of the survey analysis unions were allocated to regions based on an assessment of how some trade unions face similar contextual issues and adapting previous examples of this approach (see European

Commission, 2008 and 2012c). A full list of regional allocations is included in the list of survey respondents below.

Within the survey there is no attempt to 'weight' responses according to union size (so a response from a union of 400,000 members counts the same as a union of 40,000). Surveys of this type will always have limitations which we are keen to recognise and acknowledge. We believe the survey generates much useful data but we encourage readers to exercise caution when making any generalisations from the data presented.

Case studies were developed according to a common framework agreed with the project Advisory Group. Case studies are short and are intended to be illustrative of a range of relevant practices. There is no claim to present any detailed analysis of the extraordinarily complex organisational issues that sit behind each case, and certainly no claim to provide any objective assessment of their impact. The cases presented necessarily reflect the perspectives of those who shared their experiences and a more substantial study could have included many more perspectives. Participating trade unions were generous enough to share their experiences based on a willingness to be open and share learning and the case studies are presented in that spirit.

We conclude by reiterating that this research report is based on a relatively small-scale study. It inevitably has constraints and limitations. Our work has been guided by a commitment to provide a broad range of evidence relating to the work of teachers and other education personnel, and the strategies being adopted by education trade unions, and to seek to inform debates about future directions. We also acknowledge that aspects of the analysis will reflect our own personal histories as researchers in this field over many years. We hope that by being transparent about these aspects of the project the report can contribute in an open way to a constructive process of discussion, debate and indeed disagreement.

APPENDIX 2: SURVEY RESPONDENTS (BY COUNTRY AND REGION)

COUNTRY	REGION	ACRONYM	UNION NAME
Albania	Eastern Europe (non - EU)	SPASH	Independent Trade Union of Education of Albania
Armenia	Eastern Europe (non - EU)	CRSTESA	Branch Republican Union of Trade Union Organizations Workers of Education and Science of Armenia
Austria	Centre	GÖD-Lehrer	Gewerkschaft Öeffentlicher Dienst
Azerbaijan	Eastern Europe (non - EU)	AITUCEW	Independent Trade Union of Education Workers of the Azerbaijan Republic
Belgium	Centre	ACOD	ACOD-Onderwijs
Belgium	Centre	COC	Christelijke Onderwijs Centrale
Belgium	Centre	COV	Christelijk Onderwijzersverbond
Bulgaria	Eastern Europe (EU)	SEB	Bulgarian Union of Teachers
Cyprus	South	KTOS	Cyprus Turkish Teachers' Trade Union
Cyprus	South	OLTEK	Association of Teachers of Technical Education Cyprus
Czech Republic	Eastern Europe (EU)	ČMOS-PS	Českomoravský Odborový Svaz Pracovníků Školství
Denmark	North	BUPL	The Danish National Federation of Early Childhood and Youth Educators
Denmark	North	DLF	Danish Union of Teachers
Denmark	North	DM	Dansk Magisterforening
Germany	Centre	VBE	Verband Bildung und Erziehung
Germany	Centre	GEW	Gewerkschaft Erziehung und Wissenschaft
Estonia	Eastern Europe (EU)	EEPU	Eesti Haridustöötajate Liit

COUNTRY	REGION	ACRONYM	UNION NAME
Estonia	Eastern Europe (EU)	UNIVERSITAS	Federation of the Estonian Universities, Institutions of Science, Research and Development
Finland	North	OAJ	Opetusalan Ammattijärjestö
France	South	FERC-CGT	Fédération CGT de l'Education, de la Recherche et de la Culture
France	South	UNSA Education	Union nationale des syndicats autonomes - Education
France	South	SNES-FSU	Syndicat national des enseignements de second degré
Georgia	Eastern Europe (non - EU)	ESFTUG	Educators and Scientists Free Trade Union of Georgia
Greece	South	DOE	Greek Primary Teachers Federation
Greece	South	OLME	Greek Federation of Secondary State School Teachers
Hungary	Eastern Europe (EU)	SEH	Syndicat des Enseignants de Hongrie
Italy	South	FLC CGIL	Federazione Lavoratori della Conoscenza CGIL
Italy	South	UIL-S	UIL Scuola
Kazakhstan	Eastern Europe (non - EU)	KTUESW	Kazakhstan branch Trade Union of Education and Science Workers
Kyrgyzstan	Eastern Europe (non - EU)	TUESWK	Trade Union of Education and Science Workers of Kyrgyztan Republic
Lithuania	Eastern Europe (EU)	LESTU	Lithuanian Education and Science Trade Unions
Luxembourg	Centre	SNE	Syndicat National des Enseignants
Malta	South	MUT	Malta Union of Teachers
Netherlands	Centre	AOb	Algemene Onderwijsbond
Norway	North	UEN	Utdanningsforbundet
Poland	Eastern Europe (EU)	ZNP	Zwiazek Nauczycielstwa Polskiego
Poland	Eastern Europe (EU)	NSZZ "Solidarność"	National Education Section of NSZZ "Solidarność"
Portugal	South	FNE	Federação Nacional da Educação
Portugal	South	SINDEP	Sindicato Nacional e Democrático dos Professores
Portugal	South	FENPROF	Federaçao Nacional dos Professores

COUNTRY	REGION	ACRONYM	UNION NAME
Republic of Ireland	Centre	ASTI	Association of Secondary Teachers of Ireland
Republic of Ireland	North	INTO	Irish National Teachers' Organisation
Republic of Ireland	Centre	TUI	Teachers' Union of Ireland
Romania	Eastern Europe (EU)	FSLE	Fédération des Syndicats Libres de l'Enseignement
Romania	Eastern Europe (EU)	Alma Mater	Federația Națională Sindicală ALMA MATER
Russia	Eastern Europe (non - EU)	ESEUR	Education and Science Employees' Union of Russia
Scotland	UK	EIS	Educational Institute of Scotland (EIS)
Scotland	UK	SSTA	Scottish Secondary Teachers' Association
Serbia	Eastern Europe (EU)	TUS	Teachers Union of Serbia
Slovakia	Eastern Europe (EU)	OZPŠaV	Odborový zväz pracovníkov školstva a vedy na Slovensku
Slovenia	Centre	ESTUS	Education, Science and Culture Trade Union of Slovenia
Spain	South	CSI·F Enseñanza	Central Sindical Independiente de Funcionarios. Sector de Enseñanza
Spain	South	FE.CC.OO	Federación de Enseñanza CC.OO
Spain	South	STEs-Intersindical	Confederación de Sindicatos de Trabajadoras y Trabajadores de la Enseñanza - Intersindical
Sweden	North	Lärarförbundet	Lärarförbundet / Swedish Teachers' Union
Sweden	North	SULF	Swedish Association for University Teachers and Researchers
Switzerland	Centre	SER	Syndicat des enseignants romands
Turkey	Eastern Europe (non - EU)	EGITIM SEN	Education and Science Workers' Union of Turkey
Ukraine	Eastern Europe (non - EU)	STESU	Trade Union of Education and Science Workers of Ukraine
United Kingdom	UK	NEU	National Education Union
United Kingdom	UK	UCU	University and College Union
Uzbekistan	Eastern Europe (non - EU)	NTUESCWU	National Trade Union of Education, Science and Culture Workers of Uzbekistan

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