

Strengthening the trade unions: The key role of labour education

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Editorial

It is no doubt more than appropriate that, over ten years after the last major international trade union meeting on labour education (Helsingør, 1994), the 2007 Symposium organized by ACTRAV, the Bureau for Workers' Activities (Geneva, 8–12 October 2007) should be devoted to this topic. It is one of considerable importance to workers' organizations. No, we do not mean the *Labour Education* that you are reading at this very moment. We are talking about the training of activists, shop stewards and leaders which, almost since the birth of trade unionism, has been one of the main sources of its faithfulness to its ideals and principles, its growing strength, its constant adaptation to new realities and, last but not least, its durability.

Does all this international attention mean that labour education is in crisis? Certainly not. Every year around the world, it trains hundreds of thousands of trade unionists in the basics and techniques of collective bargaining, trade union recruitment and organizing methods, occupational safety and health issues, rights at work, equality and so on. In many countries, it goes beyond workplace-level concerns and deals with the role of trade union organization in society, the strengthening of democracy and the fight for social justice or the environment.

As truly popular education, in the best sense of the term, labour education does not mimic the teaching given in schools and universities, although the importance of that teaching is of course beyond dispute. Rather, it offers a unique kind of training which takes as its starting point the problems faced by working men and women. Its content can be very different to school curricula, and its teaching methods are its own. Constantly evolving, labour education has broadened its own scope and has established crossover points with all levels of the education system, including the universities. The workers' activities programme of the International Training Centre of the ILO, Turin has not lagged behind. Each year, it trains several hundred trade union leaders, confirming the high value that the ILO assigns to strengthening the capacities of workers' organizations through labour education.

So why devote an international symposium to it? The answer is simple. Labour education has already given much to the trade union movement, but in future it may well have to give even more. And since the Helsingør meeting, the world has changed and the challenges posed by globalization and the need for decent work have become clearer. The issues at stake are summed up very well by Bruce Spencer, from the Athabasca University, in his contribution to this special issue of *Labour Education*: "Beyond immediate concerns trade unions also have to wrestle with the question of what it is they want to achieve through labour education. Are they simply striving to represent members within the new global order or should they strive to become key players in civil society?" If they choose

the latter, Mr Spencer adds, there are implications for labour education; the focus of labour education would shift (but never retreat) from representative training that is core labour education, towards courses and programmes stressing education for community building as much as for work. In other words, training will also have to expand, adding courses and programmes that will enable trade unionists to take part in the construction of society as a whole. This debate has already begun, and some trade union centres have started adjusting and experimenting with new pathways. Hence the idea of the 2007 Symposium, which will enable trade unionists involved in training on all five continents to dialogue, exchange views and experience, and look into coordination and synergies. This discussion should provide an opportunity to pinpoint the trade union movement's current and future concerns in the field of training, and to adapt its teaching methods and programmes to meet them.

Labour education is the main implement at the trade union movement's disposal. And we should never forget that it is, to a large extent, financed by trade unionists' dues. It is therefore also a precious investment. "If you think education is expensive, try ignorance!" So said Derek Bok, former President of Harvard University. His wisecrack became the slogan of many a trade union campaign to improve the quality of public education, but of course it applies equally to the unions themselves, which know how important it is to invest in training.

Apart from being an implement for the unions, labour education is also the laboratory in which activists cook up new ideas for mobilizing, so as to face the new problems that they encounter in the workplace or which are of more general concern to workers. Stress, violence at work, homophobia and harassment are some of the issues that trainers have had to tackle – sometimes even before they found their way onto their union organization's agenda.

Today, trade union organizations and their training programmes have to take account of the effects of economic globalization, the demand for decent work, the fight against the spread of HIV/AIDS and against any discrimination towards HIV-positive people, climate change, migration, and the expansion of the informal economy. They have to prepare the workers' representatives to take responsibility for complex negotiations: economic integration processes, strategic poverty reduction programmes, flexicurity, multinational company councils. Important issues such as good governance, debt reduction for the poorest countries, and the programmes of big funders such as the International Monetary Fund or the World Bank are all part of the everyday workload facing national and international trade union organizations.

And all this in an environment that often does not exactly foster dialogue. In its first annual report (September 2007) on violations of trade union rights, the new International Trade Union Confederation cites 144 murders of trade unionists in 2006, more than 5,000 arrests in connection with trade union activities and more than 8,000 cases of dismissal for the same reasons. The report lists violations of freedom of association, to varying degrees, in 138 countries.

This special issue on labour education is a good place to recall that, for the ILO, labour education is more than a necessity. It is a right. Article 2 paragraph (c) of the Paid Educational Leave Convention, 1974 (No. 140), stipulates that each ILO Member shall formulate and apply a policy

designed to promote paid educational leave, including for trade union education. And various instruments stress the importance of this provision for different categories of worker – young, part-time and older workers, those with family responsibilities and night workers.

The international workers' 2007 Symposium on labour education could also provide an opportunity for the unions to commit themselves to promoting the ratification of Convention No. 140 (to date, it has garnered just 34 ratifications) and to remind governments of the importance of this instrument.

Our colleagues at the Programme for Workers' Activities of the International Training Centre of the ILO, Turin, and those in the Bureau for Workers' Activities at ILO headquarters, have contributed to the preparation of this special issue, looking ahead to the discussion that will take place at the 2007 Symposium on labour education. Their analyses do not provide any ready-made pattern for the labour education of tomorrow. Nor do they claim to do so. That was not their aim. But together with the analyses by other specialists published in this issue, they shed some light, they take stock and they give food for thought – as they also will for the discussions ahead.

In fact, globally focused literature on labour education is in short supply. The trade union movement's contribution to the promotion of education for all, free of charge but of high quality, is known and acknowledged by the public at large. But the movement's own training role, through labour education, has stayed out of the limelight. This despite the major investment that it requires, in terms both of financial and of human resources. The international workers' 2007 Symposium on labour education and the documents that will be devoted to it, including this one, will help to fill that gap. They will enable the ILO and, more particularly, its Bureau for Workers' Activities to reassess training programmes in the light of the conclusions that will be adopted. Above all, it is hoped that they will fuel the debates and will be enriched by them and that the discussions will produce an action programme that can make labour education even more effective, even more relevant and better adjusted to the age of globalization.

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Globalization and labour education

How can a global labour education programme meet the challenges of a global economy? And what is the role of labour education in achieving decent work for all? These issues underlie the strategies and future development of the Programme for Workers' Activities of the International Training Centre of the ILO, Turin.

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ACTRAV Turin can be considered the training arm of the Geneva-based ILO Bureau for Workers' Activities (ACTRAV). ACTRAV Turin has the mission of delivering a global labour education programme for the ILO. The aim is to assist the labour movement's capacity-building and its education structures and programmes. Labour education programmes today are geared to helping the international trade union movement tackle the challenges posed by globalization. Three main dimensions need to be addressed here: the globalization of trade, the globalization of production, and the globalization of finance.

Globalization of trade

The globalization of trade refers to the expansion in volume and variety of cross-border transactions in goods and services, as well as the development of technologies in the area of information and transportation.

Between 1950 and 1970, developed countries increased their productive capacity to rates never attained before, through the international diffusion of the Fordist model¹ – in other words, mass production and the use of assembly lines. As a result, companies had to find new foreign markets to which they could export the excess

supply of products and services. Another consequence was the rise of intra-firm trade, one of the major components of contemporary international trade.

Developing countries, on the other hand, started to become involved in the processes that characterize the internationalization of global production. Increasingly, they became both suppliers of raw materials and cheap labour and recipients of the subsidiaries of multinational enterprises (MNEs). Between the 1960s and the 1980s, developing countries started switching from import substitution to export promotion policies for a variety of reasons (e.g. economic stagnation and the need to balance their budgets as a result of the adoption of Structural Adjustment Plans imposed by the International Monetary Fund and the World Bank). They also fostered their industrial development. As a result, they progressively started to integrate into the world trading system, although their participation was still patchy and far from being pursued on an equal footing with the developed countries.

The trade agenda of the World Trade Organization (WTO) is at the core of the interest of the international labour movement, which right from the start sought a recognized advisory role, together with other actors representing groups in civil society. The International Trade Union

Confederation's network on Trade and International Labour Standards (TILS) has been monitoring the work of the WTO and has conducted campaigns to have the interests of organized labour included in its trade agenda.

The processes characterizing the globalization of trade are still ongoing. Despite trade negotiations at the multilateral, regional and bilateral levels, world trade distribution continues to be polarized² and protectionism persists within the international trade community. These imbalances are the result of asymmetric liberalizations which were carried out in agriculture and textiles or, for example, in the trade-related aspects of intellectual property rights (TRIPS). Mutual reduction of tariffs, quotas and technical barriers to trade was achieved among some countries in the GATT/WTO Rounds, in regional trade agreements and with the intensification of bilateral trade agreements.

ACTRAV has developed specific curricula on international economics, regional economic integration and political economy, with the aim of assisting national trade unions to develop the technical and educational capacity of their senior leaders/staff/activists in these fields. The courses focus on the role of trade unions in influencing negotiations on bilateral and multilateral agreements. The aim is to have labour rights and workers' interests built into these agreements – including bilateral free trade agreements, which have significant economic and social implications for the workers in the different regions.³

The ACTRAV Turin courses emphasize the role of the social partners in ensuring that the economic benefits of increased trade and foreign investment are more equally and fairly distributed, and that the fundamental principles and rights at work are universally recognized and applied. The challenge for trade unions is to press governments to maximize the social and economic advantages of trade and foreign investments, through effective trade union participation in social dialogue. Building educational capacity in this area would facilitate the development and im-

plementation of economic and trade policies which respect and promote the ILO's concept of decent work.⁴

Globalization of production

The globalization of production systems is another pillar of economic globalization. It has a great impact on the way unions organize their members, their activities and their educational programmes.

The processes characterizing the globalization of production started in the mid-1970s, mainly driven by multinational enterprises. They resulted in greater productivity gains which were rarely distributed to workers, in particular in developing countries where freedom of association and the right to collective bargaining are often denied or limited by national labour laws.

The global production chains/networks that were developed in this context have completely redefined the composition and the numbers of both the blue- and white-collar workforce and, in general, have decreased the number of workers employed in the industrial sector.⁵

The spread of technological innovation and the relative decline of costs in transportation, telecommunications, information technology and automation enabled MNEs to internationally relocate single units of the production cycle. The classic self-contained Fordist plant was broken up into subunits and spread amongst different locations and territories. In other words, production was de-territorialized (e.g. product design in Europe, engineering in India, manufacturing in China, marketing in the United States).

While the Fordist model was deeply rooted in its local environment, these new plants are highly mobile, have few linkages to the local backyard and are attracted by incentives offered by territories and local communities competing with each other. This process is at the base of the so-called "race-to-the-bottom", where national/local governments create artificially short-lived comparative advantages

by lowering labour standards, slashing welfare provisions and granting tax exemption to foreign firms.⁶

Under this new pattern of production, a so-called new flexible-mobile-global enterprise has appeared, with the capacity to modify its structures and functions rapidly through the relocation of production units and the extensive use of outsourcing and subcontracting.

These are the main features of this new model of production, the so-called “post-Fordist model”, which have emerged with globalization.

MNEs “monitor and scan the world” in search of the most suitable sites to locate, outsource or buy semi-manufactured goods or the final product itself.⁷ So, contemporary production is organized around flexible global networks and clusters.⁸

It should be noted that for some multinationals, production is no longer a priority. In some cases (varying from sector to sector), production has become a secondary activity for firms.⁹ Their main source of profits is now marketing brands and logos or dealing on the financial markets. In most cases, production is contracted out to a large number of small and medium-sized enterprises (SMEs), often located in export processing zones (EPZs), while the brand-based firm handles only non-productive activities such as marketing and the organization of world production.¹⁰

The changing configuration of world production has also had a profound impact on the international division of labour and the commodity chain. Changes in production patterns are associated with the cross-border distribution of incomes, and have major effects on labour organizations and their capacity to conduct collective bargaining at the sectoral or enterprise level. These developments have paved the way for the rise of the so-called “knowledge economy”. At the same time, a strong informal economy has emerged in developing and, in some cases, in industrialized countries.

For the above reasons, ACTRAV has put at the centre of its educational agenda the objective of organizing workers in their

social and economic environments. These workers operate in diversified labour markets characterized by different degrees of formal/informal economies which, in most cases, are embedded in unified global production cycles and chains of production. What has to be further developed is an organizing strategy able to connect these workers and their political and social demands at the regional and global level.

ACTRAV has developed specific curricula which deal with organizing, collective bargaining and labour relations. In particular, the Programme for Workers’ Activities of the ILO, Turin has developed training courses on collective bargaining with a focus on the International Framework Agreements (IFA) and on how to analyse and conduct research in the area of labour relations.

These courses also focus on the role of trade unions in analysing the changes imposed by globalization and on how to respond to new training needs in the area of organizing. In particular, some curricula were built around the presentation of case studies on the organization of informal workers and on strategic alliances between organized labour and workers in the informal economy.

Globalization of finance

The globalization of finance is the third pillar of globalization and it too is of great relevance to labour issues and to the strategies that need to be developed by the international labour movement.

By the end of the 1970s, the world economy was becoming increasingly based on international capital flows rather than on production and trade. This process is referred to as the “financialization of the economy”. Financial markets and networks are heavily influencing the development of the world economy. Another important dimension of globalization is the rapid growth of financial markets, with the lifting of capital barriers and the creation of an enormous mass of financial resources that are mainly used for speculation.

If the globalization of trade and production is still an ongoing process, this is much less the case for the globalization of finance. With liberalization and the computerization of the stock exchanges, capital of all kinds now moves around the world with scarcely any restrictions.

Today, a class of international investors has arisen, and the range of financial products on offer to them is vast (over a half million different kinds of securities). The amount of capital circulating in the world financial market rose from US\$2,000 billion in 1980 to \$20,000 billion in 1990. Money can be easily transferred worldwide instantaneously via a global banking network. Speculative capital movements have become very dominant, adding considerable financial instability to the system and fostering crises. Central banks have to accumulate more reserves than in the past as a safeguard against speculative attacks and sudden outflows of capital.¹¹

Last but not least, most of the developing world is marginalized from foreign direct investment (FDI) inflows. This is particularly true for the African continent (with the exception of South Africa), and to some extent for South Asia and the Middle East. Developed countries continue to be the leading international investors, accounting for about 80 per cent of the total FDI stock.

The Turin curricula on international economics, regional economic integration and political economy also deal with this dimension of globalization. Here, the aim is to develop an understanding of these changes and raise awareness of the major causes behind regional financial crises such as those in South-East Asia in 1997.

Political decisions supporting globalization

All these global developments, often driven by technological changes, were also accompanied by political decisions, which played a key role in shaping the economic and social outcomes of glo-

balization. The introduction of neo-liberal economic policies was based on the liberalization of trade, privatization of public services, the reduction of welfare provisions and the flexibilization of labour market policies. These macroeconomic policies worked against the transformation of globalization into an opportunity for working people.

At the end of the last decade, the economic and social crises prepared the ground for the development of new policies that aim to reconcile economic reforms with a social agenda. These changes are associated with the negative perception of globalization. Data on trade, foreign direct investments and the distribution of income show that globalization is a polarized process from which only some industrialized countries and a limited number of newly industrialized countries (NICs) benefit.

A globally integrated production system based on the informal economy and post-Fordism

Technology-intensive modes of production, and work in the informal economy based on labour-intensive conditions of production coexist side by side in fragmented production cycles, both in developed and developing countries. The worsening of working conditions and labour standards is in some cases pushing the globalized economy back to the origins of capitalism, with such features as forced labour, child labour and precarious work.

This is particularly evident in the new international division of labour, both in developing and developed countries, where the informal economy, export processing zones, contract labour and other types of worker coexist at the core of the MNEs' industrial and service infrastructure and operate within the same cycle of production in different locations.

What is being developed today is a system where, on the one hand, the informal economy and factories organized around

traditional, Fordist and post-Fordist systems of production together form a global production network which is unified and integrated by the management of MNEs while, on the other hand, the labour side is fragmented. The reduction of costs to keep competitiveness at high levels has, more than ever, hurt workers through the reduction of wages, welfare provisions and labour rights.

In the light of all these developments, three questions emerge: Are workers' organizations globalizing, as well as their strategies? Are different national labour markets converging into a global one based on the respect of fundamental labour standards? Is the global labour movement able to achieve new forms of solidarity and mutual cooperation based on the development of permanent and mutually supported networks?

Globalization of democratic values and of workers' rights has today become the priority of a unified global union movement. Capacity building towards democracy implies respect for labour rights and the existence of strong and independent social partners.

For this reason, one of the major pillars of the ACTRAV Turin programme is the development of courses on international labour standards and on workers' rights. In particular, the Programme for Workers' Activities has developed specific curricula aimed at training trade union specialists in this area so as to improve trade unions' reporting to the ILO and create capacity building on the procedures involved in preparing formal complaints on violations of labour rights.

As we have seen above, labour education can play a prominent role in shaping the development of international trade union action to globalize solidarity and workers' rights. ACTRAV Turin and the Programme for Workers' Activities have an important role to play in supporting the international labour movement with the necessary tools and skills to address globalization issues.¹²

A new agenda for labour education

ACTRAV Turin aims to strengthen workers' organizations and their capacity to provide labour education and to respond to the challenges imposed by globalization. In particular, the programme sets out to build permanent capacities in labour organizations, through the development or strengthening of staff, and related specialized departments, in charge of supporting and executing the major tasks and functions of trade union work in the areas of organizing, workers' rights, employment policies, social protection, labour relations/collective bargaining and information technology (IT) developments. In addition, the programme aims to provide an integrated educational approach which is needed to respond to the multifaceted challenges of globalization.

New skills and new capacities are also needed in the labour movement; this implies the development and adaptation of multidisciplinary curricula designed to support the process of organizing workers in the global economy.

In this regard, ACTRAV Turin has played an important role in developing labour education in the past decade.¹³ As part of a global effort to build trade union training capacity and awareness on the global economy, ACTRAV Turin facilitates the linkage between international, regional, subregional and national training on subject areas that are related to decent work, organizing and network development.

The values and principles that inspire the work of ACTRAV Turin are the following:

- Labour education is a strategic tool for building strong, independent, democratic and representative trade unions that can respond to the challenges imposed by globalization.
- Labour education aims at strengthening solidarity, building strong and effective unions, influencing society, organizing and recruiting and promoting equality via the concept of decent work.

- Priorities include organizing, freedom of association and collective bargaining.
- Delivery of training activities is aimed at developing sustainable educational trade union networks.
- A universally accessible electronically based educational network should be built to further assist the development of labour education.
- Full integration of gender perspectives into educational programmes should be ensured.
- Specialized residential training courses at the ILO Turin Centre, including a training methodology component (active learning methods);
- Follow-up seminars and training activities jointly developed with the field structure of ACTRAV;
- The development and strengthening of online labour education;
- Delivery of staff training for ACTRAV.

The ACTRAV Turin programme has reoriented its efforts towards the ILO focus on decent work. It has done so by strengthening trade union training policies and programmes to enable unions to autonomously develop their own responses in several technical areas. These areas are mainly related to specific functions that need to be performed by workers' organizations, with specific skills and competencies:

- Integrating the Decent Work Agenda and its four dimensions;
- Rebuilding strong trade union organizing patterns, focusing on the different organizing strategies needed in the formal and informal economy;
- Developing global social dialogue by supporting the Global Union Federations (GUFs) through concrete national and transnational educational programmes and plans, leading to multinational industrial relations and the reinforcement of International Framework Agreements;
- Addressing the issue of network development and of the "digital divide" within the labour movement.

Within these strategic areas, the programme has developed 14 curricula which are continuously updated through a process of consultation within ACTRAV (Geneva and the field).¹⁴

Finally, the programme's delivery can be summarized within four broad categories of training activities/services:

The programme also develops training manuals and publications relating to workers' education – see http://www.ilo.org/actrav/english/library/library_home.html.

Training methodology

The majority of programmes for workers' activities organized by ACTRAV Turin deal with specific subject areas. They make use of a training methodology throughout the course based on active learning methods. This participant-centred approach encourages the full engagement of each course member in programme activities, validates trade union experiences brought by trade unionists and assists the trainers in delivering the technical component of the course.

Courses begin by drawing on the experience, skills, knowledge, and attitudes of participants. A country report is always prepared by participants and sent via email to the ILO Turin Centre before the course. Country reports are discussed during the first sessions. In some courses, participants are invited to introduce themselves using a mailing list, and by doing so they start familiarizing themselves with IT capabilities before reaching the Centre. Once participants reach the Centre, they are introduced to the Solidarity Communications (SoliComm) communications system (for more information on SoliComm, see the article by Marc Bélanger on page 19) and are trained to work in online conferences. This online education system offers great

potential for the continuation of the education process after the residential course and for the development of regional networks on specific topics.

A comparative analysis of the different countries/subregions represented in the programme is the first step in calibrating the training needs and, consequently, the training objectives of the course with the participants. This approach leads to a continuous adaptation of the course pace/content within the group and with the trainers. In other words, trainers are responsive to participants' needs, which arise during the development of the programme.

The initial section of a course includes presentations of the ILO/ACTRAV and international labour standards, with a focus on freedom of association, gender, globalization and core ILO-related issues.

There are always subject-specific training materials prepared by ACTRAV (training packages) and the trainers. A large number of practical exercises facilitate assimilation and the exchange of experiences/information between course participants and trainers. This approach creates a high degree of responsiveness to the programme and encourages participants to apply the results of the course work to their trade unions. The final phase of the programme at the Centre is the preparation of work plans for national/local implementation. They are usually prepared by all course participants prior to the study visit to the ILO in Geneva and/or to a major trade union centre, usually taking place during the last week of the course. The implementation of this approach, based on active learning methods, is continuously monitored through course meetings and weekly evaluations.

A wide variety of teaching methods are used in the programme, such as role playing and case studies. For the exercises, the participants are usually divided into small groups, except in the case of the final workplans prepared by each participant for his/her own organization. Reports presented in plenary sessions, as well as further comments and advice from the trainers, are recorded and included in

the training packages provided to participants at the end of the course. With the development of the ACTRAV web site, all the courses and online training activities have a web page, with complete course descriptions as well as activity files related to the course, such as regional/subregional reports and participants' workplans.

This methodology has been extended to all programmes in the various languages and to those activities jointly promoted with other technical programmes.

In future, the programme should further extend interregional training programmes, where the delivery of courses aims to reach participants from developing and developed countries, working together in a training environment based on sharing their experiences and their visions of the effects of globalization on workers' organizations. Those courses would also help the labour movement to devise common international strategies and actions jointly developed by workers from the South and the North.

Strategic developments in the ACTRAV Turin programme for 2006–10

ACTRAV can be, to some extent, an "initiator" or a "catalyst" for change in the area of labour education, but it has to work with partners as it has neither the capacity nor the desire to carry out this process alone. So it is important for the programme to define a development plan based on selected strategic areas during the period 2006–10. In particular, it should:

1. Support the development and strengthening of specialized technical departments in labour organizations within the strategic areas of the Programme for Workers' Activities of the ILO, Turin and develop core curricula which are continuously adapted to regional needs.
2. Support the merger between the International Confederation of Free Trade Unions and the World Confederation

of Labour through the delivery of appropriate training programmes and develop specific workers' approaches/visions in terms of methodologies and course content, so as to contribute to the development of a new trade union international organization.

The following are key areas of action:

- Develop and support regional educational networks as part of a global labour education network
- Further develop SoliComm as a union communication platform
- Strengthen the link between ACTRAV training activities and the International Labour Conference's agenda
- Systematically emphasize gender mainstreaming
- Integrate distance education with residential training
- Provide credentials such as the International Computer Driving Licence and finalize the joint provision of degrees with labour-oriented universities
- Develop joint activities for trade unions from developing and industrialized countries and within the framework of South-South cooperation (globalization and migration).

Information technology and the ACTRAV Turin programme

Technological innovation has increased communications speed, information exchanges and the transport of goods around the globe. By doing so, it has changed people's perception of space and time and has made it possible for the first time ever in the history of capitalism to organize trade and production just-in-time in different locations and territories.

Major changes in communications and transportation have also brought new opportunities for developing cross-border networks. More than 1 billion people were on the Internet by 2006.¹⁵ This positive

development within globalization offers the labour movement the unique opportunity to network across borders, on the condition that it can narrow the digital divide between workers' organizations, especially between developed and developing countries.¹⁶

Information technology can be an important tool in the development of union capabilities. Consequently, the programme has over the past few years conducted month-long residential courses on IT, organized week-long seminars on the subject, provided consultation services, created software, written training material and taught courses completely online.

Building on this experience, the programme will continue its concentration on IT labour education, including the use by labour educators of email, online conferences, email lists, databases, word processing, spreadsheets, presentation programmes and the creation of educational web sites.

The programme plans to reinforce capacity building for the use of IT by unions, in developing countries and global labour organizations. It plans to build on this by:

- Creating new software training material: Training material will be developed to cover the complete range of IT topics, with special emphasis on open source, free software. This material is being written to comply with the curriculum established by the International Computer Driving Licence.
- Expanding distance education courses and activities: The programme will build on its expertise in distance education and provide more online courses and seminars. It will continue to work closely with GUFs to build their capacity to provide distance labour education.
- SoliComm: A major expansion of SoliComm's use within the international labour movement is under way. Trade union centres in the developing world will be invited to use SoliComm's services, including the hosting of educa-

tional web sites. Technical support for this expansion will be provided partially by programme staff, but most of it will be supplied by the users themselves. Special online support conferences will be created in which SoliComm members can work amongst themselves to learn and solve their technical difficulties. SoliComm facilities will be translated from the current English/French/Spanish/Portuguese to other languages. Further technical development of the system will include a conference message notification system. The use of SoliComm will be carefully researched in order to provide a technical and pedagogical guide to distance labour education. Special attention will be paid to the technological and pedagogical needs of women.

- Labour Education Network: With the creation of SoliComm, and the experience the Programme for Workers' Activities of the ILO, Turin has developed in distance education, the technologies and pedagogies to create a global labour educators' network is now in place. This network, working rather like the Global Union Research Network (GURN), will be used to link labour educators from around the world, share training materials, develop international curricula on subjects such as globalization and conduct online training. The first parts of the network have been created by involving former participants in Latin America and in the Asia-Pacific regions.
- The development of a database on existing education centres owned by trade union organizations all over the world as well as the number of labour educators employed by national centres, regional and international organizations.

Conclusion

It is by strengthening the capacity of workers' organizations through labour education programmes that ACTRAV Turin aims to tackle the multifaceted challenges of globalization, so helping to achieve the ILO's objective of decent work for all.

Notes

¹ Cairola, E.; Revelli, M. 2004. *Training Manual on Fordism and Post-Fordism: Organizing Workers in the Workplace*. Second (revised) edition (Geneva, ILO).

² Kyloh, R. 2000. "Recent trends in trade and investment: Globalization or polarization?" in *Governance of Globalization: The ILO Contribution*, ACTRAV working paper, available at <http://www.ilo.org/public/english/dialogue/actrav/publ/global.htm>. See also *Globalization and Workers' Rights*, available at <http://www.itcilo.it/actrav/actrav-english/telearn/global/ilo/eemeli/kaide.htm> [30 July 2007].

³ Ishibashi, M. 2003. *Trade Union Training Guide on Asia and Pacific Economic Forum (APEC)* (ILO-AC-TRAV, Turin), available at <http://training.itcilo.it/actrav/library/english/apec/000.htm> [30 July 2007].

⁴ International Labour Office (ILO). 1999. *Report of the Director-General: Decent Work*, International Labour Conference, 87th Session, June.

⁵ —. 1997. *World Labour Report 1997–98: Industrial Relations, Democracy and Social Stability* (Geneva).

⁶ The ILO has defined EPZs as "industrial zones with special incentives set up to attract foreign investors, in which imported materials undergo some degree of processing before being re-exported". For further information, see: Singa Boyenge, J.-P. *ILO database on export processing zones* (revised), Working Paper No. 251, Sectoral Activities Programme, ILO, Geneva, 2003.

⁷ The number of employees in foreign affiliates worldwide, a measure of the employment capacity of MNEs, has grown dramatically: it reached \$53 million in 2002, up from \$19 million two decades ago. There are about 5,174 EPZs in the world, approximately accounting for 41,934,133 workers, mainly concentrated in Asia (China above all), Mexico and Central America (ILO, 2004).

⁸ Although figures give evidence of a clear trend towards the international relocation of production, it should be recalled that enterprises still keep a link with the territory, especially when it comes to strategizing research and technological innovation. For instance, the geographical location of firms matters and makes a difference in the case of industrial clusters, where SMEs join forces to attain levels of excellence that allow them to stay on global markets.

⁹ It should also be noted that competition has dramatically increased because MNEs continue to compete worldwide with each other to gain shares ultimately in saturated world markets.

¹⁰ The extensive spread of subcontracting is related to the issue of corporate social responsibility. In 2006–07, the ILO has focused activities in terms of research and training in this field.

¹¹ In 1997, capital market transactions peaked at a record share of 95 per cent of the total international transactions (world exports accounted for no more than the remaining 5 per cent). In monetary terms, international financial transactions in 1997 amounted to about \$1,500 billion per day, whereas world trade accounted for \$25 billion only. Likewise, the proportion of foreign exchange dealings directly related to transactions in “real” goods fell from 90 per cent at the beginning of the decade to less than 5 per cent at the end. Capital is a stronger pillar of globalization than trade.

¹² For further information on globalization, see E. Cairola, D. Cibrario, *Trade Union Training on Globalization*, ILO, ACTRAV Turin, 2005, available at <http://www.itsilo.org/actrav/global/biblio/biblio.htm> [30 July 2007].

¹³ ILO ACTRAV in Geneva was created as a department that grouped two services, EDUC and RELTRAV. The structural changes began in the 1980s. After some time, there was a tendency for the various functions of ACTRAV staff, especially in the field, to become more or less interchangeable. The expansion of the role and function of ACTRAV Turin, at the centre as well as in the field, has filled some of the gaps created by the relatively lower priority given by ACTRAV to labour education.

¹⁴ The field staff structure of ACTRAV also includes workers’ education specialists (four staff members who are specialized in labour education).

¹⁵ According to the Internet World Stats (updated to June 30, 2006), 1,043,104,886 people use the Internet, which corresponds to 16 per cent of the world population. In particular, 56.4 per cent of Internet users live in Asia, 14.1 per cent in Africa, 12.4 per cent in Europe, 8.5 per cent in Latin America, 5.1 per cent in North America, 2.9 per cent in Middle East and 0.5 per cent in Oceania.

¹⁶ For this reason, ACTRAV Turin has heavily invested in education programmes related to IT and network development.

The present and future challenges of labour education in the global economy

Millions of trade union activists, members and representatives benefit every year from labour education as part of efforts to build up capacity and face the challenges of a changing world of work. Beyond immediate concerns trade unions also have to wrestle with the question of what it is they want to achieve through labour education. Are they simply striving to represent members within the new global order or should they strive to become key players in civil society? If they choose the latter there are implications for labour education: the focus of labour education would shift (but never retreat) from representative training, i.e. core labour education, towards courses and programmes stressing education for community building as much as for work.

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Labour education refers to education and training offered by labour unions (trade unions) to their members and representatives. The extent to which this education is provided directly by unions or by another agency or educational institution for unions varies from country to country and union to union. A main purpose of labour education is to prepare and train union lay members to play an active role in the union. ("Union education" can be used interchangeably with "labour education" in this article. "Union education" is sometimes reserved for courses run directly by unions as opposed to labour education courses run for unions by other providers.) Another purpose is to educate activists and members about union policy, about changes in the union environment such as new management techniques or changes in labour law. Labour education is also used to develop union consciousness, to build common goals and to share organizing and campaigning experience. Unions have a small full-time staff and

therefore rely on what is essentially voluntary activity of their members to be effective at work and in society; the labour education programme is thus a major contributor to building an effective volunteer force.

Most labour union members learn about the union while on the job (what is often referred to as informal or incidental learning). They probably will learn more and become most active during negotiations, grievances and disputes, but they also learn from union publications and communications, from attending meetings, conferences and conventions, and from the union's educational programmes. Although labour education only caters to a small number of members in any one year it is designed to benefit a larger number of members because the course participants are expected to share the learning gained with other union members. Labour education has a social purpose – to promote and develop the union presence and purposes, so as to advance the union collectively.

Core labour education

Most of the labour education courses provided by unions are *tool* courses (for example, shop steward training, grievance handling, and health and safety representative courses). The next largest category is *issue* courses (for example, sexual harassment or racism or new human resource management strategies), which often seek to link workplace and societal issues. A third group of courses can be labelled *labour studies*, which seek to examine the union context (for example, labour history, economics and politics).

Tool courses directly prepare members to become representatives of the union; tool courses are targeted at existing or potential union activists. They are provided directly by the unions, by labour federations or by union centrals (such as the Canadian Labour Congress (CLC), the Trades Union Congress (TUC) in the United Kingdom or the Swedish Confederation of Trade Unions (LO)). Tool courses are also provided for unions by educational institutions (for example by many of the labour studies centres across the United States) or by educational institutions collaboratively with the central bodies or individual unions (for example with colleges, universities and the Workers' Educational Association collaborating with the TUC in Britain). They may also be provided by specialized institutions such as the now defunct Australian Trade Union Training Authority (TUTA) or South Africa's Development Institute for the Training, Support and Education of Labour (Ditsela).

Many unions layer their courses, with introductory, intermediate and advanced courses and programmes. Advanced courses are generally available to those who have completed introductory courses. Some of the introductory tool courses lead on to issue courses (sometimes referred to as "awareness" courses), which are specifically targeted at raising awareness and union action around the issues discussed. In some cases there will not be a strict demarcation between tool and issue courses

nor a requirement to undertake one before the other but the differentiation between types (and therefore the aims and purposes) of labour education can be useful when thinking about union education.

The union movement also provides more extensive and demanding educational opportunities such as the Harvard Trade Union Programme for lead officials or evening Certificate courses in the UK or the CLC's five-week residential Labour College of Canada (which teaches four courses – labour history, economics, sociology, politics – at a first year university level in a four-week block. Labour law is now taught as a one-week course in the regions). Although the Labour College uses some university educators, and is placed in the University of Ottawa, it is a separate entity directly accountable to the CLC. This differs from the Harvard programme with its more autonomous structure and from other US college programmes and from the adult residential colleges in the UK, such as Ruskin and Northern College that offer year-long programmes and are open to union members. Similar labour studies programmes can be found in other countries and within some mainstream university offerings (particularly in Australia, Canada, Europe, New Zealand and the United States). In many cases labour studies courses are offered after members have undertaken tool and issue courses but perhaps the most innovative example of a labour studies programme offered to all union members is the negotiated paid educational leave (PEL) programme developed by the Canadian Autoworkers (CAW) and now also offered by the Canadian Union of Postal Workers (CUPW). The core offering is four separate but linked one-week units targeted at members, not just representatives and activists, and funded by an employer levy negotiated at the bargaining table (the unions retain sole control over content).

The intention of the dedicated labour studies courses is to supplement trade union tool and issue courses with a broader educational programme, and in some cases to provide a research basis

for union activity – some universities are linking directly with unions to offer research collaborations (for example Leeds in the UK) or study and research circles (for example in Sweden). Although unions are usually represented on the “boards of studies” of the university and college offering labour studies programmes these are rarely union-controlled in contrast to the union-run courses. The variations in terms of the nature, course structures and delivery of labour education courses are manifest and this article provides but a few examples drawn mainly from *Unions and Learning in a Global Economy: International and Global Perspectives*¹ and *Trade Union Education in Europe*.²

Other labour education

While tools, issues and labour studies courses might describe the majority of labour education, they do not encompass all offerings. Unions are increasingly directly involved in a number of membership education programmes some of which have a “basic educational skills” or vocational purpose. In some cases union-run literacy and second language courses are tutored by fellow unionists and act as a bridge linking immigrant or other workers to union concerns and publications. Similarly, unions are responsible for a number of worker training programmes, which allow the unions to educate workers about union concerns alongside of vocational training. In some countries skilled and professional unions have a long history of union-sponsored vocational training and education courses. Unions are becoming much more proactive in responding to company restructuring and deskilling and are arguing for reskilling, skills recognition and skills profiling, as well as challenging employers to live up to their rhetoric on “pay for knowledge.” This is a growing area of union educational work and a number of unions in different countries are increasingly becoming more involved in general membership education of all kinds.

In some cases unions have developed a comprehensive and integrated education and training programme such as Britain’s UNISON Open College, which includes labour education, basic skills, recognition of prior learning and vocational training opportunities for all union members. In Brazil, “Programa Integrar” offers union-sponsored labour education, vocational training and educational opportunities for unemployed persons (these examples are discussed more fully below). In other situations unions are engaging in workplace learning programmes, partnered with employers or other agencies. Some worker health and safety training is undertaken by unions or may be jointly offered with management (this should not be confused with union safety representatives’ tool courses referred to above). Involvement in these courses allows unions to argue for a union view (a safe workplace) as opposed to a management view (safe worker) of health and safety. Union-run worker health and safety training has also been used as part of union organizing drives.

Nor should we ignore educational provision for full-time officers within our purview of labour education. There has been a growing interest, particularly in Europe, Quebec and Canada generally, in equipping full-time officers with the educational tools needed to conduct union business in a global economy.

Labour education achievements and challenges in the global economy

It is difficult to gauge how many union members benefit from core labour education programmes but based on the statistical information available, we can estimate that some 3 per cent of union members a year undergo some labour education in most industrialized countries. The participation rate may have been double two decades earlier, when the economy was more buoyant and release time was more generously legislated (for example in Australia, New Zealand and the United Kingdom) or was easier to negotiate (in Canada and

the United States). Although unions have been weakened and union density – the percentage of the workforce that is unionized – had fallen through the 1990s in most countries (Scandinavia excepted) unions are continuing to give education a high priority. Unions in countries as far apart as South Africa and Scandinavia may be reaching 6–10 per cent of all union members if all forms of labour education (not just core) are considered.

The extent of labour education also varies over time, in some cases just reflecting economic circumstances and in others economic and legal changes. The move to neo-liberal economic policies and globalization was accompanied in many countries by attacks on the legal rights to paid educational leave for union representatives (particularly in Australia/New Zealand and Europe where these had been most extensive) and on union bargaining rights.

These educational rights became increasingly narrowly defined to rights to training for industrial relations purposes; they became more limited in the amount of time allowed, and state funding to support this activity was either cut or abolished altogether (for a review of European experience see accounts in *Trade Union Education in Europe*).

Over the years a number of studies have been conducted in a number of countries as to the effectiveness of labour education. In general they have found that union members and the unions benefit from individuals taking union courses; the courses help members to become more interested in the union; members are able to make better union decisions as a result of attending union courses; and the courses give members the confidence to take on voluntary positions in the union and to challenge arbitrary management decisions.

In addition, union education has been found to bolster members' communal, social and political activity. Labour education does support union activism.

Unions and the learning rhetoric

The current rhetoric around “workplace learning,” “teamwork,” and “the learning organization” in the context of what are referred to as the “knowledge economy” and “the learning society” has had an impact on labour education. These new descriptors of corporate and state activity in the context of globalization of production are often cited to marginalize the significance of unions and therefore the irrelevance of labour education.

We need to remember that workplace learning is essentially about learning to become a more efficient and compliant “human resource.” While the enthusiasm for teamwork may have some advantages for some workers it has to be understood within the context of human capital theory and new human resource management strategies that seek to bypass the kind of workplace democracy that independent unionism can provide. In some cases teamwork has also gone hand in hand with downsizing. This new rhetoric emphasizes unitary perspectives of workplace activity and workplace culture, workers are described as “stakeholders,” they are all asked to “share the vision;” gone is the grudging acceptance of pluralism, of the recognition that from time to time workers do have legitimate differences with employers which can be settled through the more democratic procedures of negotiation and agreement. Today the independent voice of labour is to be silenced while the sole authority of the employer is masked by the description of workers as “partners” or “associates”. In the United Kingdom, freely negotiated recognition agreements are being displaced by “partnership agreements” that emphasize employer rights including in some cases denying the rights of workers democratically to determine their own union steward.

While some of the evidence flowing from union involvement in workplace learning may be contradictory there has been a growing recognition of the problematic nature of union workplace learn-

ing initiatives that may only lead towards greater management control over workers and their unions. Never was it more important for unions to establish their legitimacy and their own distinctive education programmes.

New developments in labour education

This article has not reported extensively on the majority provision of continuing core labour education that is targeted at local union representatives, typically termed “shop steward” training. This important work is ever-changing, with differing examples evident in all countries where unions are active. There may be more emphasis on peer tutoring in one country and significant content changes in another (an example of a recent survey and discussion of Canadian provision is available at http://www.athabasca.ca/wcs/PLAR_Report.pdf). There are particular examples of new specific forms of representative training, such as that for European Works Council representatives in Europe; and examples of union representative training in difficult circumstances such as those in South Africa where unions are coming to terms with recognition and bargaining after years of opposition under apartheid. We also have reports on more sophisticated educational provision for full-time officers, an under-reported area of representative training.

Training recruiters is another new development within core labour education. The educational components of the Australian *Organizing Works*, the UK *Organizing Academy* and the US *Organizing Institute* and are important labour education responses to the decline of union influence and to shifting employment patterns. The work undertaken in organizing migrant workers in Los Angeles is a particular example that has been successful in linking union activity to community groups and community-based organizing with labour education playing a key role. The *Justice for Janitors* campaigns have been most impres-

sive and have relied on educational support to bolster activity, recruitment and contract negotiation. The region around Los Angeles has bucked the trend in the United States, providing a leading example of union growth. Some of this educational and organizing work involves existing union representatives and some of it is targeted at new members and would-be union representatives.

As argued earlier, unions are directly involved in a number of membership education programmes some of which have a “basic skills” or vocational purpose. The importance of this work for union building has been established in Australia, North Africa, Scandinavia, South America and the United Kingdom is now being emulated elsewhere. Other initiatives around union-provided basic literacy courses or vocational training courses can give organized labour a lever to improve the quality and general applicability of such programmes in contrast to the often workplace-specific emphasis of many employer-sponsored courses. Union-negotiated “employee development schemes” such as those at Ford’s UK and US plants and in the public sector in the UK and elsewhere are also contributing to broader educational opportunities for union members.

A number of unions and trade union centres organize educational programmes for specific categories of members, for example women-only courses aimed at providing a learning environment where women feel more comfortable about expressing opinions and are perhaps more likely to participate than at traditional male-dominated union schools. Unions are also providing family and community educational events; for example the Saskatchewan Federation of Labour (Canada) organizes a “Summer Camp for Kids,” for young people aged 13 to 16. This week-long residential camp introduces the teenaged sons and daughters of union members to trade unionism and social justice issues in the morning and offers recreational activities that emphasize cooperation as well as fun in the afternoons and evenings.

Britain's UNISON Open College, which includes labour education, basic skills, recognition of prior learning and vocational training opportunities for all union members definitely represents a way forward for labour education. This programme connects with members' immediate needs and in time feeds into strengthening union activity and presence in society. It can also provide critical approaches to current issues, something which is lacking from more homogenized adult education and training. The importance of the UNISON³ initiative cannot be overstated. What UNISON has done is recognize the failure of much basic adult education and stepped in with a *Return to Learn* (R2L) programme that provides opportunities for workers to become better educated and to ladder that introductory course up through their Open College to other programmes and even full degrees. It takes the "learning society" rhetoric seriously and accesses employer and state funding and claims time off work for their members. The courses are based on UNISON developed educational material. Its link with the Workers' Educational Association for tutoring of R2L assures an adult education focus with materials utilizing collective understandings. This educational initiative is benefiting the members and the union.

Similarly the negotiated (as opposed to state-provided) PEL programmes in Canada offer another important example of membership education, one focused on developing critical political understandings. The CAW led the way and now CUPW have followed with a similar programme. Other unions in other countries need to examine the possibilities of this approach. The main features of this programme include a negotiated, employer-paid levy to a union-controlled trust. The union uses the fund to pay for lost wages and expenses of its members who attend the four-week residential PEL course. By targeting these courses at members (not representatives) the unions hope to engage their members' imaginations and draw them into greater union understandings and activity. The

core four-week programme has been supplemented by other courses also funded from the levy.

In Brazil, "Programa Integrar" now offers relevant vocational training and educational opportunities both for unemployed and employed persons that work to strengthen the union presence. The programme illustrates that even in a hostile climate union education can succeed: it provides an example to other countries of how to build community links and to argue for alternative worker cooperative employment for union members in opposition to global corporate power. This example links with others in South America where union members are taking back closed factories and building local economic networks.

Although the use of research circles (workers conducting their own research into workplace or sector problems) has been around for some time it is clear from Swedish experience that this approach has a bright future in terms of strengthening union activity within the union as well as externally. It represents an important alternative for union members wishing to conduct independent "workplace learning" projects.

Courses on new global management techniques have developed with colourful titles like *Union Judo* – the idea being to use the "weight" and "momentum" of the employer to union advantage. Nor have unions ignored free trade and globalization itself. These topics are by their nature difficult for unions that are single-country based, but additional emphasis has been given to international union activity in the last ten years, and not just to courses for union representatives from works councils of transnational companies (as outlined above) but also including increasing union presence on United Nations bodies. Unions have become active on international bodies discussing environmental, conservation, and sustainable development issues and these initiatives have an educational component. Unions have responded to calls for international workers solidarity with some courses not

only dedicated to garnering a greater understanding of the issues but also involving study visits and exchanges. In other examples union educators have built units on solidarity work into basic steward courses and into membership courses. Unions have also responded to educational challenges posed by widespread computer use and the Internet and are using online education for union members. An obvious use for labour online learning is to build education across national boundaries: the ILO is now working on an international labour studies programme (see also articles by Enrico Cairola and Marc Bélanger in this issue).

The activities of some transnational corporations may provide a threat to unionism but the response of international union federations and some individual unions (sometimes aided by non-governmental organizations) to seek “framework agreements” may result in new opportunities for unionization in those countries. These agreements reached with corporation head offices push them only to do business with suppliers who recognize workers’ rights and independent unions. It is difficult to predict whether or not these measures will be successful in accelerating union development in countries such as China, Indonesia, the Philippines and Thailand, but union education initiatives are already under way. The existence of these framework agreements and labour education initiatives means that the future is more promising than might be predicted otherwise.

Many of the initiatives described above have elements of both accommodation and resistance to current globalization trends. Some courses and programmes can be seen as proactive, others as adaptive, while

much of labour education remains reactive. Overall, unions remain an important and positive social organization for working people; it is the absence of strong independent unions that remains a problem for most of the world’s workers. Beyond these immediate concerns, unions have to wrestle with the question of what it is they want to achieve. Are they simply striving to represent members within the new global order or should they strive to become key players in civil society? If they choose the latter there are implications for labour education; the focus of labour education would shift (but never retreat) from representative training that is core labour education, towards courses and programmes stressing education for community building as much as for work.

Notes

¹ Spencer, B. 1994. *Unions and Learning in a Global Economy: International and Comparative Perspectives* (Toronto, Thompson Educational Publishing Inc.). (Only available in English, but includes the examples from around the world discussed in the present article.)

² Bridgford, J.; Stirling, J. (eds) 2000. *Trade union education in Europe*. (Brussels, European Trade Union College). For a Spanish translation, see Bridgford, J. and Sterling, J. (eds), 2003, pp. 191–212, *La formación sindical en Europa*. Alzira: Germania Serveis. For an earlier summary version, see *European Systems of Trade Union Education*, in Gabaglio, E. and Hoffmann, R. (eds), 2000, *European Trade Union Yearbook 1999*, Brussels, ETUI. For an Italian translation, see “I Sistemi Europei di Formazione sindacale” in *Formazione Domani*, 41, 2001, Vol. No. 2, (Rome), *Istituto Addestramento*. Gereluk, W. 2001. *Labour Education in Canada Today* (Athabasca University, Alberta, Canada), also available at http://www.athabascau.ca/wcs/PLAR_Report.pdf (this report is in English with some programme descriptions in French).

³ UNISON is the UK’s largest trade union, with 1.3 million members.

Distance labour education: Solidarity learning around the globe

Is online learning better than face-to-face learning? No. But it is certainly better than no labour education at all. And online labour education can help us to build a global labour educational culture which does not necessitate crossing the world or taking people out of their workplaces.

Marc Bélanger

Labour Educator

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Belize is one of the smallest countries in the world. It sits at the base of the Yucatan peninsula in Central America sharing borders with its larger neighbours Mexico and Guatemala. It has a thriving labour movement – some 11 per cent of the workforce is unionized – but, as in many countries and regions in the developing world, its unions are having trouble coping with the effects of globalization. The country's agriculture and clothing industries are often seriously disrupted as yet another effect of globalization hits them. Union leaders, staff and members in Belize want to understand better how globalization works and they know labour education could play an important role in developing that understanding. But their unions cannot afford many labour educators and, given the country's isolated location, not many international labour educators can drop by to organize workshops. What can be done to help unions in Belize and other countries in the same situation?

One way – as unionists in Belize recently discovered – is to participate in international distance labour education courses delivered via the Internet. "For some time trade union distance learning has been dangling in the air in Belize" says Bernard Pitts, a Belizian unionist who recently participated in a course on infor-

mation technology conducted through the World Wide Web, "Now it is at hand! The possibility of unionists starting from total ignorance about information technology and web site design and getting at least basic knowledge within such a short time without a marked interruption in our work schedules is a miracle!"

Maybe not quite a miracle, but certainly an effective method for providing labour education to union activists who are too busy to attend regular classes, who work for organizations which do not have labour educators, or are in geographically isolated locations such as Belize or the South Pacific islands. This includes a lot of unionists around the world, in both developing and developed countries.

This article describes distance labour education and then provides a report on a case study of 34 unionists from 24 developing countries who participated in a recent online (via computer communications) course.¹

Distance labour education

Distance labour education started in 1985 with the creation of the Solidarity Network (SoliNet) by the Canadian Union of Public Employees. SoliNet was used to

provide training on health and safety, pay equity, information technology, collective bargaining and other union-related topics. The union's labour educators used SoliNet to discuss their curricula and develop educational materials. Their discussions were held in computer "conferences" where groups of people shared the same message base. Unlike electronic mail, which is basically an individual-to-individual medium, computer conferencing provides support for *groups* to communicate. It is in group communications that unions build their solidarity and power. The group members do not have to be on the computer system at the same time – they can read and leave messages on the central SoliComm (see below) computer at their convenience.

In 1995 SoliNet was used to conduct the first international labour education conferences. Over a thousand people from all over the world participated. The following year the system was also used to conduct the first online, credit-granting, labour studies courses. It sparked the growth of many projects including the labour news service, LabourStart, which began on SoliNet in 1995. In 2000 a later version of SoliNet called the Solidarity Communications system (SoliComm) was developed by the Workers' Activities (AC-TRAV) programme at the International Training Centre of the ILO in Turin, Italy. Meanwhile, other labour organizations were experimenting with online labour education. The European Trade Union College (ETUCO) conducted a series of pilot projects between 1999 and 2004. A number of national labour movements – most notably those in Canada, Germany, Italy, the Nordic countries and the United Kingdom – experimented with the medium. Some labour studies centres, such as those at the University of Athabasca in Canada and the University of Philadelphia in the United States began to use computer conferencing to deliver online courses. AC-TRAV Turin has been using SoliComm to organize courses on health and safety, international labour standards, globalization and other topics. Through all these experiences the potential of the medium

for delivering labour education to more unionists has been proven and many lessons have been learned on how to make it more effective.

Types of distance education

There are three types of distance education which use computer communications. The first is merely a variation of the traditional, mail-based version. Students download (transmit down to their computers) lessons which have been placed on a web site and, when they have finished the lessons, they upload (send to the central computer) their completed files or essays. They may have occasional contact with tutors via email, but for the most part they work alone. The second type is Online Computer-Based Training (OCBT). In this version students interact with online computer course to study a subject such as English, statistics or computer programming. The third type, the one most suited to labour education, is Online Collaborative Learning (OCL). Unlike the first two modes OCL is group and discussion oriented. It is aimed at the creation of *new* knowledge while the other two are designed to transmit *existing* information to students who are expected to memorize it as given. The international labour movement desperately needs new knowledge in order to prepare its responses to new and ongoing phenomena such as globalization.

The difference between transmitting existing bodies of information and creating new knowledge is an important distinction. It goes to the heart of labour education's traditional pedagogy (its set of educational philosophies and practices). The early labour movement emphasized peer-to-peer learning. Before the First World War workers learned from other workers either in peer groups they put together or in groups organized by bodies allied to the labour movement such as the Workers' Educational Association (WEA) in the United Kingdom or the labour colleges' movement in the United States. When unions took control of labour education

after the Second World War they steered educational activity away from workers' education towards union education and resorted to traditional lecture-type techniques. This lecturer-centred pedagogy began to change in the late 1960s and 1970s under the influence of the peer-learning techniques of the women's movement and the ideas of popular education theorists (most notably the Brazilian Paulo Friere). The emphasis shifted to participatory education in which the existing knowledge of participants was acknowledged and built upon, and active learning methods such as small-group work encouraged participants to learn from each other, not just the instructor.

Labour education pedagogy

By the end of the 1990s participatory education based on active learning methods was acknowledged by most labour educators as the most appropriate pedagogy for the labour movement. It promoted collaborative work in groups (the source of union solidarity and power), recognized community as a central principle, acknowledged prior-learning and existing knowledge, and focused on the participants (no longer called "students") instead of the instructor. The pedagogy itself – the manner in which education was organized – differed widely in practice and description around the world depending on the needs of the labour movement in a country, its political environment and the cultural context in which it operated.

However, a typical approach grew out of the "organizing the organized" movement in the United States in the early 1990s. Jose La Luz, who was then educational director of the Amalgamated Clothing and Textile Workers' Union (ACTWU), outlined it as a three-step process: (1) information sharing; (2) reflection and analysis; (3) action and appropriate strategy. "Our pedagogical process," he wrote, "discards the use of lectures and speeches, encouraging instead more active methods that lead to critical analysis and examin-

ation of the reality the union operates in, without making any previous assumptions. Beginning with information sharing, the process moves to reflection upon and analysis of that information, and then to strategizing about what action should be taken. After the action has been taken, the process begins again with information sharing about the action."

The Brazilian unions, as they helped their members in the early 1990s strengthen their country's fledgling democracy after years of fascism and dictatorship, adopted basically the same pedagogical stance, but went further in defining the role of political theory-building among the working class. Their labour educators devised situations to encourage union members to think about their experiences and develop theories of work. They then formalized these theories and presented them in organized and coherent ways back to the members. Then the cycle began again.

What does all this have to do with online distance education? Plenty. If education via the Internet is to be adopted and used by the labour movement it must be able to reflect the basic principles and practices of labour education: collaborative work, a sense of community, and discussion-oriented activities, all grounded in the real experiences of the members in the workplace. And it can – if it adopts the learning method called *collaborative learning*. Collaborative learning is when groups work on common tasks such as the creation of a document with the occasional advice, not control, of the instructor. The group members start off acting as individuals with widely differing viewpoints, but with the use of collaborative techniques such as small-group work and the setting of common tasks they begin to build intellectual solidarity. The key is the setting of the task (usually by the instructor). It must be not only a task that the group's members agree upon, but also be seen as relevant to their workplace. How do we know all this? Well, we have the lessons provided by hundreds of online courses in colleges and universities around the world and the millions of people who are learn-

ing online. We also have a recent study conducted by the ACTRAV Turin Workers' Activities programme. The study provides substantial evidence to show that online distance education can be an effective educational tool for international labour education.

An online course case study

The central activity of the ACTRAV Turin study was an eight-month course conducted via computer conferencing on SoliComm. Thirty-four unionists stationed in 24 developing countries participated in an online course on "Information Technology and the Creation of World Wide Web Sites". Fourteen of the participants were women. All were unionists nominated by the central labour confederation of their country and they agreed to participate in the study by signing informed research consent forms. The confederation, or the participants themselves, paid for the related Internet costs. Collaborative learning techniques were used throughout the course.

The research methodology consisted of questionnaires, interviews, group discussions, studies of the messages in the computer conferences and an analysis of the experience by the participants themselves. Four basic questions guided the study: Was there evidence of learning in the course? Did the participants think they had participated in a valuable learning experience? Was there a sense of community and collaboration generated? What are the key issues involved in the use of online collaborative learning by the staff of labour organizations in developing countries? This last question was posed not only because unions in developing countries are the focus of the ACTRAV Turin programme, but because, if it can be shown that online collaborative learning can be successfully practised in developing countries with their technological challenges, then it can be practised in the more economically advanced countries as well. The goal is to get all parts of the international labour com-

munity to participate in labour education and create the new knowledge which is needed to confront globalization.

Key findings of the online case study

A fuller description of the study and its findings is available – in English – by sending an email to the author at marc@soliscomm.net. Key findings are:

- It is possible for the staff of labour organizations in developing countries to participate in courses conducted via the Internet. Of the 34 people who started the course in January 2005, 32 completed it.
- A credential which is recognized by participants as valuable is crucial. In the course conducted for the case study, the participants studied for the examinations set for the International Computer Driving Licence – a credential recognized worldwide. The possibility of earning the ICDL contributed significantly to the course's 91 per cent completion rate.
- A high rate of messaging can be maintained throughout an online course lasting several months. The total number of messages entered into the course conferences was 1,460.
- Most course members participated from work during normal working hours. This shows that the participating labour organizations have the technological capability to allow their staff to take courses via the Internet.
- Participants maintained a high level of message reading throughout the course. This is an important piece of evidence because research has shown that people in online courses not only learn by the act of entering messages, but also by reading the messages others put in – so-called "vicarious learning".
- There was substantial evidence of learning. Learning can be defined as people moving from one state of un-

derstanding to another (what has been termed “conceptual change”). The messages in the conferences were analysed using an verifiable research instrument (Harasim’s theory of on-line learning) which showed that the participants moved from widely differing views at the start of the course to commonly held group positions at the end. In other words, the participants had changed their views – which is what learning is all about and at the same time builds a sense of group solidarity.

- Participants indicated they had learned substantially during the course. This was tested by using a questionnaire which participants completed when they finished the first course module and again at the end of the course. Overall they reported a sense of learning of 80 per cent. If they had felt that they had not learned very much the score would have been much lower.
- A very high sense of community was reported by participants. Again a questionnaire applied twice during the course was used to gauge feelings in the group. The responses showed a sense of community level of 80 per cent. This is particularly significant because the participants had never met and were working in many different countries and cultures.
- The responses of women in the group did not differ significantly from the views of the group as a whole. They felt they had learned and they felt supported by the sense of community in the group. They did however enter proportionally fewer messages than the men in the course.
- Participants enjoyed working collaboratively in groups and generally supported the two participants whom they chose to act as the discussion leader and reporter of a particular module.
- They found the conferencing system which was used (SoliComm) to be very easy to learn and use.

Key issues of online education

When participants were asked to analyse the key issues concerning the use of on-line collaborative learning by the staff of unions in developing countries they mentioned:

- the lack of computers and the difficulties in sharing computers with other staff members
- the problematic technological infrastructure of their countries: undependable electrical supplies, high telephone costs and expensive access to the Internet
- keeping up with the group as it moved through a module due to heavy workloads
- fear of group work (which was alleviated once they began to do the group assignments)
- concern about the cultural diversity of the participants (but this was quickly diminished as the participants learned that there is a universal union culture which they shared with the other course members)
- the value of well-written course training manuals.

The advantages of using computer conferencing for education mentioned by the participants included:

- being able to participate in the conference at times of their own choosing without disruption to their work schedule
- the ability to take labour education courses without leaving their workplaces
- the democratic nature of the medium in which all participants could voice their say
- the instant documentation of the discussions in the conference messages
- the feeling of international solidarity amongst a group of unionists

- access to union-centred training which would have been difficult if not impossible to have in their countries.

Discussion-based learning and community

The case study paid particular attention to how participants conducted their discussions. They started off with divergent views, supplying information and brainstorming ideas. They then began analysing the ideas which had been put forward and linking concepts. Towards the end of the discussion they began to coalesce around central ideas. This three-step process echoes the in-class labour education process described by La Luz: (1) information sharing; (2) reflection and analysis; (3) action and appropriate strategy. This shows that is possible to translate labour's pedagogy into online activity. We can apply what we have learned about popular education and active learning to courses conducted via computer communications.

The study also showed that we can translate the sense of collaboration and community found in face-to-face classes into an online environment. In other words: group solidarity – a crucial element of labour education – can be built into

online distance labour education. We can create online learning experiences which mirror the principles and values of the union way of organizing education.

Is online learning better than face-to-face learning? No. But it is certainly better than no labour education at all. Ask Bernard Pitts, the unionist from Belize, or the 33 other unionists who participated in the online course. They will tell you in no uncertain terms that for them, and other unionists in the developing world, online education is an opportunity not to be missed. We need to build a global labour educational culture which does not necessitate crossing the world or taking people out of their workplaces. Online labour education can help us do that.

Note

¹ Terms used in this article: *Union education* is activity aimed at teaching union members the operations, issues and regulatory environments of their organizations. *Labour studies* refer to university-based education aimed at critically studying the activities of working people, including their unions. *Labour education* encompasses both union education and labour studies. *Workers' education*, which is sometimes directed at union operations, is aimed at addressing the broader educational needs of working people with liberal arts studies or basic educational activities such as literacy programmes.

Research as a key element in labour education

The Global Union Research Network is a new and unique project within the international labour movement through which trade union researchers and academics are encouraged to share their knowledge. The most important challenge will be to involve trade union researchers and scholars from different streams and orientations in order to create enduring synergies on trade union research. This is an important prerequisite for influencing globalization so that increased social justice will be a major factor.

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One of the current paradoxes for trade unions is that organizing is an essentially local workplace-related affair whilst the most pressing challenge for unions, which is globalization, can only be faced in a global context, i.e. beyond the local and national forums in which trade unions have traditionally focused their action and expertise. Globalization entails several dimensions: the increase of world trade during the 1980s and 1990s, especially in the industrialized world and a few developing countries; an acceleration of foreign direct investment; the rapid integration of financial markets; technological change; and the cross-border integration of national production systems. All of these have resulted in various dramatic changes for workers and worker organizations. Globalization has also enabled large parts of the labour movement to communicate effectively and at relatively low cost. It is vital that more research on the impact and consequences of globalization is carried out so that trade unions can defend workers' rights and advance globalization and lobby and organ-

ize effectively. The Global Union Research Network (GURN) will be presented as a knowledge network created by the international labour movement partly to address this challenge.

The GURN aims to contribute to research on topics that have become prominent due to globalization. It aims to achieve this by organizing face-to-face meetings and by using modern technologies – one of the driving forces behind globalization. Indeed, the International Labour Organization (ILO) in its follow-up report on the World Commission on the Social Dimension of Globalization defines global knowledge networks as the most important approach to fill the “gap in our understanding of the social and labour impact of global economic, financial, trade, technological and environmental policies”.¹

The challenge [...] can be met by a combination of approaches, the most important of which is to take advantage of the potential of globalization itself, in the shape of rapid communications and the ease with which global networks can be built.²

* This article is a modified version of Schmidt, Verena, 2005. “The Global Union Research Network: A Potential for Incremental Innovation?” in: *Just Labour: A Canadian Journal of Work and Society*. Vols 6 and 7, Autumn, pp 43–54. Acknowledgement is due to Frank Hoffer and Lene Olsen for valuable comments on an earlier draft. To access the GURN and/or participate in the network, visit www.gurn.info.

It is first important to contextualize the GURN within the international trade union movement. Following that, the sustainability of the GURN and the barriers to its institutionalization will be examined. This article represents both an opportunity to share with others some of the main features of the GURN and also to engage in critical self-reflection about the potential for this kind of initiative to reinforce union actions in the context of globalization. The following observations are based on participant observation by the author during the development and the first two years of existence of the GURN.

In order to contextualize the GURN within the trade union movement it is essential to look at the most important challenges of labour, i.e. the danger of being marginalized by the dominant discourses.

Cultural institutions, such as political parties and the media, create a compatible version of reality, which often favours the interests of elites. The theory of cultural hegemony by Antonio Gramsci suggests that the dominant ideologies put forth by these cultural institutions are made to seem so natural, or to such an extent "of commonsense", that we do not even suspect the presence of the tacit assumptions made.³ Such is the challenge currently faced by organized labour in various countries, where it risks being marginalized by the mainstream. Deregulation, the internationalization of markets, restructured work organization as a result of new technologies as well as an identity crisis of trade unions have led to a decline in union membership.^{4, 5, 6, 7}

One result of this decline across various countries is a subsequent reduction of staff. In some instances, research allocations are cut back since researchers are often on non-permanent contracts and research is seen by some trade union leaders as less essential than other organizational tasks.

Parallel to a decrease in union membership, there is an increasing inequality on a global scale. The low or non-existing

social standards, especially in the South, are described by the dominant classes to be "normal" and inalterable side effects of globalization. Trade unions, and civil society in general, are increasingly facing an uphill battle for dignity and decent work. These changes also forge new alliances which are still in the experimental phase. Not only is a restructuring of the international labour movement taking place, but the International Confederation of Free Trade Unions (ICFTU) has resolved to work more closely with pro-labour and democratically legitimate actors within civil society.

Notwithstanding, trade unions and civil society in general have won significant battles with regard to improved basic rights, increased gender equality, a decline in racial discrimination in various countries and a democratization of countries, especially in Central and Eastern Europe in the second half of the twentieth century.

The close links and networks of interchange of opinions between researchers and trade unions also seem to be weakening. Union leaders and activists often feel that fewer younger researchers have pro-labour identities and that the world of work is increasingly moving out of their focus. Similar to broader trends with the rest of the workforce, there is an increasing individualization and depoliticization among researchers. It is felt that researchers often prefer to study social realities from their ivory towers rather than in the field. Traditionally left-wing researchers, especially those within industrial relations, had pro-labour identities. Contrary to that, many young researchers today are part of the mainstream which often only means repeating the above cited dominant discourses. It is thus important for the international trade union movement to develop innovatory approaches:

- (1) to improve communication channels among trade union researchers;
- (2) to improve communication channels between trade unions and pro-labour researchers;

- (3) to lead outspoken and innovative debates on current research and its implications for the labour movement; and
- (4) to challenge mainstream conceptions.

The GURN and the Master's programme on Labour Policies and Globalization (see article by Frank Hoffer) are projects established to motivate trade unionists so that they can reflect upon and question the dominant discourses on globalization and economic restructuring.

The creation of the global union research network

In 2001 the ICFTU, the Trade Union Advisory Committee to the OECD (TUAC), the European Trade Union Council (ETUC), several Global Union Federations (GUFs) (then called International Trade Secretariats) and the World Confederation of Labour (WCL) conducted a major policy and strategic review of international trade unionism referred to as the Millennium Review. It concluded by stating the urgent need to build research capacity and links between researchers, particularly in the global South:

Global Unions also require greater capacity to generate and co-ordinate policy-oriented research on global economic issues and an enhanced ability to convey and manipulate research data and analytical arguments. In the short to medium term, this means greater production and co-ordination of union-friendly research, including by maintaining profiles and databases with researchers in both the North and the South [...]. Co-ordination between trade union research centres needs to be enhanced. This requires better use of technology including database libraries and on line information centres. All union-generated research should be available on line to all unions worldwide. The union movement itself must work to overcome our own "digital divide".⁸

The Global Union Research Network (GURN) was established in January 2004 as a follow-up to the strategic review of

the Global Unions Group. The initiative was taken by the ICFTU and TUAC and was carried out with the assistance of ACTRAV, the ILO's International Institute for Labour Studies as well as financial support from the Dutch trade union federation's development department FNV Mondiaal and the German government. The GURN is facilitated by ILO ACTRAV, the steering committee consists of the ICFTU (now ITUC) and TUAC and ILO ACTRAV. The aim of the research network is to give union organizations better access to the research carried out within trade unions and allied institutions, while enabling them to exchange information on matters of joint concern and to develop the capacity to make analyses and take part in debates and policy formulation. The GURN aims to facilitate and initiate research which is relevant for the international labour movement. More concretely, the GURN consists of several elements: research, resource web pages for research, online discussions, a research database, an inventory of research institutes and newsletters. In order to assess the progress of the GURN it is important to keep in mind the aims defined at the foundational workshop of the GURN in January 2004 in Turin.

Research

At the first workshop in January 2004 one of the aims the research network identified was:

to give union organizations better access to research carried out within trade unions and allied institutions, while enabling them to exchange information on matters of joint concern and to develop the capacity to make analyses and take part in debates and policy formulation.⁹

As a follow-up to the foundational workshop of the GURN in 2004, two topical workshops have been organized to date. The first, *Trade Unions, Globalization and Development*, took place ahead of the World

Social Forum near Porto Alegre in Brazil in 2005. The second, *The Impact of Global Production Systems on Labour*, in close cooperation with the Global Union Federations and the Institute for Social Studies in The Hague, took place in the Netherlands in 2006. In both cases calls for papers were carried out to attract interesting contributions, including from previously unknown researchers. The most important contributions will be published in separate books. In addition two working papers have been published by the GURN, one¹⁰ in cooperation with Naledi, a trade union research institute in South Africa and another¹¹ in cooperation with the ICFTU.

The long-term viability of the GURN depends on the genuine interest and active participation of researchers from trade unions and the broader research community. Even though the exchange and systematization of existing research form an important task for the GURN, it is also important to facilitate and to carry out genuine research by its participants in order to stimulate and generate new ideas and debates.

Resource web site for research

Aims were also defined for the GURN web site at the foundational workshop. They are as follows:

- to develop an essential repository for trade union research;
- to publish contact information of GURN members and participating organizations, and
- to develop resource web pages on different issues.¹²

The priority issues for the resource web pages have been determined by members of the network in accordance with their resources. That means that only topics which were seen as relevant could be chosen and where a network organization volunteered to work on the topic. The following organizations conceptualized research information packages for the Internet:

- ICFTU, Switzerland, bilateral and regional trade agreements;
- TUAC, France, corporate governance;
- TUAC, France, OECD Guidelines for Multinational Enterprises;
- ILO/Ethiopia, international financial institutions (IFIs) and poverty reduction strategy papers (PRSPs);
- NALEDI, South Africa, economic alternatives and poverty eradication;
- ETUI, Belgium, collective bargaining and wages;
- ILO/ACTRAV, Switzerland, migration;
- CRIMT/CLC, Canada, global trade union strategies (union renewal);
- PSI, France/GURN, Switzerland, health politics and trade unions;
- TUAC, France, sustainable development.

For all the issues and topics dealt with, gender, labour rights and employment are seen as cross-cutting issues. The GURN has also developed a list of more than a hundred research institutes and trade union departments dealing with research.

Moderated discussions

The development of online moderated discussions were suggested at the foundational workshop in Turin in 2004, and it was decided to start with discussions on bilateral agreements and migration.¹³

To date, three different moderated online discussions have taken place in the framework of the GURN:

- Preparation of the General Discussion on Migration at the International Labour Conference, moderated by ILO ACTRAV (April 2004)
- Bilateral and Regional Trade Agreements, moderated by ICFTU Geneva office (March 2005)
- Outcomes of Country-Level Trade Union Actions to Influence Policies

of the International Financial Institutions, moderated by the ICFTU/Global Unions office in Washington (January 2006).

The moderated discussions were perceived as an important means to motivate GURN members to become active. This was successful to some extent, although the moderation of these discussions and particularly the translations were seen as very time-consuming. In each of the three discussions draft texts and reports were discussed and subsequently modified after the online discussions. In the case of migration the results of the discussion were used by participants as background material for the discussion in the Committee dealing with Migration at the International Labour Conference in June 2004.

Database

With regard to the database the GURN foundational workshop defined the importance of keeping an open mind on technical and human resource possibilities if the GURN web site is to become an essential repository for trade union research around the world (including database with search function).¹⁴

The GURN database was created in the beginning of 2006 in cooperation with the Friedrich Ebert Foundation as a tool for transnational exchange of ideas and information of trade union research worldwide. It serves as an expanding information pool from which trade unionists can obtain information and into which they can deposit their research documents. Currently more than 150 articles are included in the database.

LISTSERVE and GURN newsletters

The aims defined at the first Workshop in January 2004 for the LISERVE and the newsletter were to:

- ensure good information flow on what union researchers and union-friendly academics are doing worldwide;
- facilitate exchange of information;
- summarize research on key areas and on general union research;
- disseminate information about new research publications, reports, etc.¹⁵

The GURN LISERVE is used for the exchange of information and regular newsletters, summarizing research on key areas and on general union research. It has been developed for union researchers as a tool for information sharing on new research, new reports completed, etc. Information is currently shared through the list serve to some extent. However, it is hard to find a balance between sending out enough information and too much. As some GURN participants constantly receive information from a large number of sources, it is vital that it is focused and relevant to end users.

The GURN issues regular newsletters where new research results are disseminated and which update GURN participants on the activities of the network. To date nine newsletters have been published.¹⁶

GURN sustainability and barriers to further development

In order to institutionalize the fledgling GURN as a sustainable innovation, it is important to take into account the strategic triangle which was developed by Levesque and Murray¹⁷ for trade union work but can be transposed to the GURN. The strategic triangle consists of strategic capacity, internal and external solidarity. Most importantly, the *strategic capacity* of the GURN needs to be developed. It is essential to use the GURN to foster genuine research and discussions about current issues which are of relevance to trade unions and to policy-makers. The *internal solidarity* means that GURN adherents

have various ways to participate and that there are communication channels between members, the outside world and those organizations that are responsible for particular subject areas within the GURN. The *external solidarity* refers to the capacity to link with the community at large, including researchers outside trade unions but also the public at large.

It is a major challenge for the GURN to strengthen the links with researchers within universities and to build up close relationships between the labour movement and academia. It is also important to assess critically the potential impediments to the success of such a research network. The most important difficulties are language barriers, technological barriers and organizational inertia. Each will be examined in turn.

Language barriers are one of the key issues for the network. A research network which strives to be global needs to communicate in more than one language in the medium term. This problem has been partially addressed by translating the web index pages of the GURN into French and Spanish and by including article in other languages than English into the research database. Technological barriers include insufficient experience with new technologies due to educational barriers and limited access to the Internet due to scarce resources and insufficient infrastructure. In order to help overcome the lack of experience with new technologies, training courses on technology within trade unions are of prime importance. ACTRAV, for example, offers such courses as an integral part of its workers' education training. A variety of strategies are being pursued in order to address the problem of limited access to new technologies due to scarce resources. The entire GURN web site and the database are copied to a CD to enable off-line access at regular intervals. Furthermore the web site is designed as "plain" as possible in order to facilitate uploading of pages on slow and erratic Internet connections. Organizational inertia, the third barrier to the GURN, is undoubtedly the most difficult

to address. All researchers have various resources on which they regularly rely. A preselection of knowledge resources decreases investment costs to learn about new resources and also reduces complexity. To overcome this inertia, it is important to facilitate interesting research and debates in order to create a critical mass of participants that makes an initial investment to the GURN. This can only be achieved by pointing to the medium and long-term benefits both to individual and trade union research.

Currently the GURN only addresses some of the key areas of concern to the international trade union movement. This represents an important challenge for the GURN. One of the tasks of a network is to motivate its members to participate actively as it is very much a decentralized network which depends on the commitment of member organizations. The spectrum of interests in a network should correlate with a well-defined audience so that the audience (i.e. the cooperating organizations) see a benefit in being a member of the network. The GURN participants have defined a relatively open and broad spectrum of interests and there is a multitude of audiences of the GURN such as trade union researchers, trade unionists who want to use the GURN for readily accessible information and pro-labour university researchers. The unifying factor of these different audiences, which hopefully results in a sustainable commitment on their part, is the quest for social justice and the fight for dignity and decent work.

Conclusion

The GURN is a new and unique project within the international labour movement through which trade union researchers and academics are encouraged to share their research. In order to institutionalize the GURN, it is important that the international labour movement has ownership of the GURN and uses it as one of its primary resources for research and policy

background information. The most important challenge for the GURN will be to involve trade union researchers and scholars from different streams and orientations in order to contribute to interesting and creative debates and thereby create enduring synergies on trade union research. This is an important prerequisite for influencing globalization so that increased social justice will be a major factor.

Notes

¹ ILO. 2004. *A Fair Globalization. The Role of the ILO*. Report of the Director-General on the World Commission on the Social Dimension of Globalization (Geneva, ILO), p. 540.

² *ibid.*

³ Gramsci, Antonio. 1995. *Further Selections from the Prison Notebooks*. Edited and translated by Derek Boothman (London, Lawrence and Wishart).

⁴ Fairbrother, Peter. 2000. "British Trade Unions Facing the Future", in: *Capital and Class*, issue 71, pp. 47–78.

⁵ Hannigan, Thomas A. 1998. *Managing Tomorrow's High-Performance Unions* (London, Quorum).

⁶ Weil, David. 1994. *Turning the Tide* (Ontario, Lexington).

⁷ Dunlop, John T. 1990. *The Management of Labor Unions* (Massachusetts, Lexington).

⁸ TUAC. 2001. Millenium Review. Interim Report from the Global Economy Reference Group. Draft. Unpublished Manuscript (Paris), paras 26 and 27.

⁹ See <http://www.icftu.org/www/PDF/IFI.pdf> [2 Aug. 2007].

¹⁰ Frye, Isobel. 2005. *Extending Social Security to Developing Countries. Particular Emphasis on Healthcare and Informal Economy Workers*. GURN Discussion Paper No. 1 (Geneva), available at <http://www.gurn.info/topic/econalt/healthcare05.pdf>.

¹¹ ICFTU. 2006. Fighting for Alternatives: Cases of Successful Trade Union Resistance to the Policies of the IMF and the World Bank. ICFTU/GURN (Geneva).

¹² See <http://www.icftu.org/www/PDF/IFI.pdf> [2 Aug. 2007].

¹³ *ibid.*

¹⁴ See <http://www.gurn.info/newsletr/01/2004> [3 Aug. 2007].

¹⁵ *ibid.*

¹⁶ See <http://www.gurn.info/newsletr/index.html> [3 Aug. 2007].

¹⁷ Levesque, Christian; Murray, Gregor. 2003. "Le pouvoir syndical dans l'économie mondiale: clés de lecture pour un renouveau", in: *Revue de l'IRES*, vol. 1, no. 41.

The Global Labour University network – Bringing unions and universities together

Trade unions need to engage in networks and alliances to promote the labour agenda in public debate. Cooperation between trade unions and universities are vital to strengthen labour-orientated research and offer high-level qualification programmes for trade unionists. In this context, the article reflects on the experience of the Global Labour University in building a network of Global Unions, national trade union centres' universities, labour foundations and the ILO's Bureau for Workers' Activities to develop and implement international Master's programmes on global labour issues for trade unionists.

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Reversing the marginalization of social justice and fairness in public debate requires, first and foremost, liberation from an intellectual slavery that is unable to think beyond globalization as an overwhelming tide of unregulated market forces. Debate leads not always and immediately to policy changes, but there are rarely policy changes without analytical groundwork, debate and critical reflection.

Shifting the public debate

The unleashed global market has to be civilized through global rules. This requires global public debate, campaigning and global civil society initiatives to maintain and broaden the concept that people and not markets determine the rules of society. Without an international regulatory framework, national options for reducing labour competition are replaced by options to adapt to a race-to-the-bottom.

The vision of social justice and meaningful democracy requires a global dimension – as the retreat towards national isolation is no option, even for powerful nations. With a view to promoting mutually acceptable global rules and global solidarity, these debates have to be international in topic and composition.

Interests are inevitably becoming more diverse, complex, and competitive within more internally differentiated societies, and within a closely interlinked global economy marked by huge inequalities and imbalances of power. The trade union movement can rely less and less on a fairly homogeneous and loyal core working class with similar workplace conditions, similar social milieus, similar values and political orientations. Nostalgic dreams about the good old days of a broad unified working class are firstly, idealizing the past, secondly, ignoring the socio-economic and cultural reasons behind these changes and thirdly, leading towards isolation and declining influence.

* The author would like to thank Edlira Xhafa, a former Global Labour University student, for her comments and critical feedback.

Labour is acting in an environment where competing interests are constantly trying to influence and dominate public opinion. Power and reason are decisive factors in shaping debates and decisions. It is the exception that power can act totally beyond reason, and good arguments are rarely without any power. However unfortunate, daily experience shows that power often buys reason. This option does not exist for trade unions. They are financially outgunned by companies and the myriads of think tanks, foundations, academics, and media, sponsored and at least partly controlled, by the rich and powerful. Lacking the power of money and organizational power, the power of reason becomes more important.

Engaging in debates and alliances with other civil society groups, think tanks and academic institutions is part of any strategy to gain influence in public debate. It is unlikely that labour can achieve the required substantive policy changes on its own, but it certainly cannot be done without organized labour. This pivotal role of labour in any serious alliance for change creates the space for a self-confident but open-minded approach to such dialogue processes. Historically, changes towards more democracy and social fairness grew out of such “new deal” coalitions.

Regaining strength and membership requires, among others, attractive and innovative ideas to shape globalization; productive international networking; efficient support for organized members; a welcoming organizational culture and an open-minded but confident internal dialogue among members and, externally, with civil society organizations, academic institutions and political parties.

In the industrialized countries, labour issues are far less prominent in the academic discourse than decades ago. At universities, many “friends of labour” are retiring. Industrial relations are partly replaced by management and HRD research, the debate about labour law has shifted from securing dignity and respect for workers towards a discourse on labour market rigidities. Income equality is often

no longer treated as a desirable objective but as an obstacle to creating dynamic and competitive markets. The late 1960s, when “sympathy with the proletariat” was in vogue among intellectuals, have passed. In many developing and transition countries, politicians and university professors are educated in the Western pro-business schools promoting a model of development favouring liberal orthodoxy. They often play a crucial role back in their home countries by shaping not only the politics of the moment but also paving the same way of thinking for the new generations to come. Trade unions can no longer assume, in the same way, a commitment to the causes of the labour movement. They have to take a much more proactive role in building partnerships and dialogue with the academic community and civil society groups. As in personal relationships, it is as much about being with the right partner as finding the right partner.

The research and knowledge base for new and innovative ideas to promote the age-old visions of social justice, freedom, and solidarity in the twenty-first century will not be created without tapping into the intellectual capacity of universities and research institutions, where the bulk of research in today's world is undertaken. Within universities, there are allies who share the understanding that there is a need for better social global governance and that this requires genuine global discourses on these issues. However, they cannot become partners on the basis of an instrumental understanding of research sometimes prevalent in the labour movement, where scientific “evidence” is requested merely to support the already well-known truth.

The complex reality of globalization requires a wide range of qualification and education programmes for trade unions. These programmes necessarily differ in their methodology, target group and content. For example, a programme to develop capacity for health and safety provisions at the workplace can more directly rely on the practical shop floor experiences of participants than a programme that focuses

on non-agricultural market access negotiations (NAMA) regulations at the World Trade Organization or the risks and causes of exchange rate volatility for real wages and employment.

Cooperation with universities is one element of a comprehensive qualification strategy. In many countries fundamental changes in the role of universities in society have taken place in the past 50 years. From being elitist educational institutions they became mass universities providing higher education to a substantial part of the younger generation.

While in the past trade unions recruited their professional staff nearly entirely from workplace activists, trade unions increasingly see the need to recruit staff that has not only a trade union background but also high-level formal qualification. There is a growing number of trade union members, leaders, trade union staff and labour educators with university degrees, as the labour movement increasingly also needs people with academic skills. This also creates the need for trade unions to consider which types of academic programmes are required to meet their needs.

Bringing expertise together – Building a Global Labour University

Challenging the conventional wisdom, analysing the changing pattern of work and societies, building alliances and bridges between labour and academic institutions, and providing academic qualification programmes for trade unions are the motivating forces to build a Global Labour University and global union research networks.

Trade unions need to have ideas and concepts for a social dimension of globalization far beyond the workplace and even the nation state. This requires a different type of mobilizing power, information sharing, knowledge generation and analytical capacity. For democratic movements, responses to global challenges cannot be found in an isolated national context. For trade union efficiency within international companies, for influencing

international rule making, its crucial to understand diversity, build mutual trust and establish cross border exchange and cooperation. Multidisciplinary and international research and debate is an important element to achieve better understanding and cooperation.

Pooling limited resources and sharing knowledge can be facilitated in open and transparent horizontal network structures. Networks are efficient and valuable for knowledge sharing, discussions and debate – they are far less suited for decision-making. The best way to destroy a network is to try to control it from one point, or to make it a decision-making institution with inevitably dubious democratic legitimacy.

However, many networks lose momentum because they lack an active and acknowledged facilitator, purpose or commitment. Most people are very busy and will only contribute to a network if this is related to specific projects or tasks. Focusing the GLU around the development and implementation of Master's programmes on labour policies and globalization at different universities has created a common purpose and strong commitment among the partners.

The possibilities, the potential, and the need for international networking, exchange, and cooperation increase. However, the barriers remain formidable. Business, academic, cultural, political, sport, or entertainment elites have created global communities. Labour is lagging behind. The lack of language skills, cultural differences, financial constraints and competing interests make direct communication and cooperation difficult.

The need to:

- (a) enhance the analytical capacity of trade unions to understand and challenge the existing common wisdom about globalization;
- (b) build alliances with the broader civil society;
- (c) develop alternative ideas for a fair and inclusive globalization; and
- (d) build sustainable networks;

puts additional challenges on trade union research, labour studies, and workers' education in a broad sense. This concerns the content, the instruments and the methodology of cooperation. At national level many trade unions have created different cooperation arrangements with universities to strengthen their knowledge base and to build alliances with academic institutions that often play a formative role in influencing public opinion.

In 2002, in cooperation with Global Unions, labour foundations, universities and national trade union centres, the ILO started an initiative to build a similar network between trade unions and academic institutions at an international level. The Global Labour University (GLU) idea was launched in order to facilitate discourse, stimulate research, and provide university-level qualification programmes on the political, economic and social dimensions of globalization for labour and trade union experts. The immediate objectives are to:

- (a) engage with trade unions and universities to develop and implement new university curricula to broaden the debate and knowledge base on labour and equity issues in universities;
- (b) qualify trade unionists and other interested labour experts, through internationally recognized university-based post-graduate programmes, on the political, economic and social dimensions of globalization from a labour perspective;
- (c) establish a network for joint research on global labour issues; and
- (d) facilitate discourse among trade unionists and researchers concerning the challenges of globalization.

In the pilot phase from 2002–05 the GLU network developed and implemented a pilot Master's course on "Labour Policies and Globalization" (see table) at the universities in Kassel and Berlin. An international group of academics and trade unionists developed the curriculum for this course over the past three years at a

series of workshops. International experts joined the staff from the two universities to teach at the pilot course. National and international trade unions actively engaged by offering internship opportunities to the students.

In September 2005, a first group of students from 18 countries successfully graduated from the pilot course. A continuous feedback and evaluation process between the students, the universities and the broader network allowed the course to be modified. Many "teething problems" were already addressed in the second course that finished in September 2006.

International teams are working on textbook developments concerning global governance, macroeconomic regimes and development, trade unions and globalization. The annual GLU Conference is a platform for researchers, trade unionists, and GLU students to debate the global challenges labour is facing. The conferences are also opportunities to develop new joint research initiatives. The findings of the annual conference are published in regular GLU yearbooks.

Since January 2007, the University of the Witwatersrand (South Africa) in cooperation with the Congress of South African Trade Unions offer an additional Master's course on labour and development within the Global Labour University framework. In 2008 a third course will be launched by the University of Campinas in cooperation with the Unified Workers' Confederation (CUT) Brazil. This will have a special focus on development economics and on trade unions strategies towards transnational companies in developing countries.

Regular international workshops provide the opportunity to assess jointly the experiences gathered in the pilot programme. The extension to two southern universities strengthens the North/South cooperation within the GLU and allows students to pursue their studies partly in the north and partly in the south. It helps to overcome a certain dominance of Eurocentric thinking in the pilot course.

An international graduate school on the social dimension of globalization for PhD

Curriculum of Master's Programme on Labour Policies and Globalization

Regular courses	Elective courses
R 1 Trade Union Strategies in a Global Economy	E 1 Workers' Rights in the Informal Economy
R 2 Governance of Globalization	E 2 Theories of Social Justice
R 3 Strategies of Multinational Companies and Labour	E 3 International Trade Union Politics
R 4 Economic Policy and Union Strategy	E 4 Gender and Globalization
R 5 Labour Rights and Sustainable Development	E 5 Migration and Global Labour Markets
R 6 Organizational Development of Trade Unions	E 6 Legal Framework of International Trade Union Influence
One World Seminar	E 7 Globalization and the Welfare State
Colloquium on Current Trade Union Policies	E 8 Privatization, Deregulation, and Liberalization of Services
	E 9 History of Trade Unions
	E 10 Work and Society
	E 11 Development Economics
Six weeks' internship with national or international trade union organization.	

students was launched in 2007 at the University of Kassel. The concept of the GLU is based on the assumption that influencing the globalization process is a continuous effort that requires not only joint teaching but also research collaboration.

In September 2007, the first GLU Alumni summer school was established to strengthen the international network and to develop new ideas for international cooperation and research initiatives.

The GLU project has been successful in:

- agreeing, among very diverse project partners, the structure and content of the curriculum;
- selecting a highly motivated, diverse and gender balanced group of trade unionists/students for the course;
- establishing a certified and internationally recognized Master's course on "Labour Policies and Globalization";
- initiating new forms of international cooperation between trade unionists and academics;
- initiating joint research and textbook development;
- contributing to the international debate on global labour issues; and
- qualifying trade union experts on global labour issues.

However, many issues remain for further debate. Some of the constantly debated questions will be discussed in more detail below. They are:

- A. Cultural diversity
- B. Language barriers and monolingualism
- C. Gender mainstreaming
- D. Finding good applicants and keeping them in the labour movement
- E. Prioritizing resources
- F. Why a residential course in the age of the Internet?
- G. Recognized Master's programme versus labour education and adult learning versus university teaching.

A. Cultural diversity

Bringing people from different cultural backgrounds together is a precondition for experiencing and understanding cultural diversity. It offers unique opportunities to learn from each other, to look at globalization processes from different perspectives and to debate globally acceptable visions and strategies.

However, putting people from around the world in one group by no means automatically creates multicultural understanding. Being in a foreign country, facing dual language barriers, (re)starting university studies and working within a group of 18 nationalities creates insecurity, stress, and sometimes an initial reaction of retreat.

The fact that all participants share some common trade union values is helpful, but sharing the same political values does, by no means, imply necessarily personal sympathy or practical solidarity. People become more aware about their cultural differences. Not everybody becomes friends and a need for genuine tolerance remains because differences and diverging political views remain after overcoming initial ignorance, insecurity, or prejudices.

Different countries have also other learning cultures and different traditions how to interact in class room. The natural insecurity of facing a new environment leads sometimes rather to a retreat than to an opening up. However, at a later stage the sense of belonging to the trade unions prevails and helps to overpass these insecurities.

Proactive facilitation is required to support the common study process based on interaction, participation and mutual support. This cultural diversity becomes at the same time a very important lesson of understanding some of the dynamics of international solidarity and action, which can not be taken for granted and which require an intensive process of understanding and reflections.

B. Language

Language is a central problem. Those who have to communicate in a foreign language face an additional barrier in discussions and monolingual Anglophones do not always reflect sufficiently on their “language advantage”, and quite “naturally” dominate discussions. The more limited ability of non-native English speakers to express themselves in writing and speaking creates high levels of stress. The fact that most natives in Kassel and Berlin prefer to speak *deutsch* is an additional cultural and language challenge for the participants in the pilot course. On the other hand, it also puts at least native English speakers under the need to operate outside the classroom in a foreign language.

There have been discussions whether the GLU should also offer courses in other languages. However, this would create subgroups where just the Arab Spanish or Russian speaking community would be among themselves. “Broken” English is the lingua franca of our time and whoever wants to participate in a global debate has to master this language, and labour needs more people from the non-English speaking world to broaden the global discourse about labour policies and globalization. The understanding of globalization processes and the search for policy responses will greatly benefit from more trade unionists outside the English-speaking world bringing their knowledge into the debate. The positive side of the language problem is that while other problems might grow during a course, this is bound to diminish over time.

C. Gender mainstreaming

The programme has been successful in ensuring a high participation of women (more than 50 per cent). This was achieved through strong encouragement for qualified women to apply, and safeguarded by a compulsory quota of a minimum of 40 per cent participation by women. Ensuring a gender balance among the teach-

ing staff and the international network proved to be more challenging. This is partly due to the fact that, within the academic institutions, and also in many trade unions, women are strongly underrepresented in leading positions. The network itself has limited control about the decision of network partners who will represent the organization at network activities. It requires a constant awareness-raising effort to ensure that the commitment to gender mainstreaming is maintained in practice at all levels.

In designing the programme, gender mainstreaming was defined as a key feature of the curriculum. In addition to a special (elective) course on gender, all courses should be gender mainstreamed i.e., they should systematically analyse the different impact of policies on men and women. In a diverse network, this can best be done in the medium-term through a continuous process of debate and reflection.

D. Prioritizing resources

There is never enough money to do everything which is meaningful. The challenge is to make choices between important issues. The trade union movement must address a broad range of complementary training and qualification needs from basic trade union organizing seminars, shop steward training, leadership courses, to high-level university programmes. However, in reality complementarity is not achieved through a central plan, but through a process of trial and error. Different qualification programmes are developed by different institutions.

Over time those programmes survive that are perceived by trade unionists as valuable. Some programmes might survive for a while because they have donor funding or are part of a well-funded institution, but at the end of the day qualification programmes that do not meet a genuine demand will neither find participants nor donor funding.

The resource question is not merely a question of total costs, but also of sources

of funding. Does the training activity entirely depend on membership dues for funding or can partnerships help to mobilize a broader resource base? The GLU has created partnerships with universities that permit combining the resources of trade unions, donors, the ILO and publicly funded universities. There is also no need to build and maintain a school or to hire full-time staff as the courses are based within existing universities. This gives the GLU a high level of flexibility and a very low level of fixed costs. It has mobilized commitment in universities to focus teaching and research activities on labour issues, because it opens avenues for interesting interaction with trade unions and the ILO.

E. Finding good applicants and keeping them in the labour movement

Will committed trade unionists have the time and money to leave their job for a year? Will their trade union let them go? Elected trade union officials cannot allow themselves to be away for a whole year and trade union leaders are similarly reluctant to absent them. These constraints make it difficult for many otherwise interested trade unionists to apply. However, there have been many applications for the pilot courses in the last three years, so that there certainly is a demand.

The programme built in several safeguards to target the "right" people to apply. Participants have to be recommended by their trade union. Applicants are required to write a short essay explaining their motivation for participating in the programme and indicating their research interests. For applicants from developing and transition countries the GLU has mobilized resources for scholarships. A scholarship from the programme is conditional on a matching contribution from the trade union or another donor to safeguard against recommendation letters that are more a favour to the applicant than a serious recommendation.

Requesting the endorsement from the trade union might work to some extent as a selection mechanism that excludes applicants critical of their own leadership. It gives the trade union centres a certain power of pre-selection. However, the programme is designed not only for the individual skills development of trade unionists, but also for organizational capacity building. Hence, anybody who applies should be sufficiently anchored in his or her organization, something evidenced by the organization's support of their application.

One of the great challenges and risks of a qualification programme of this type is that people lose contact with their trade union and use the newly acquired qualification to look for better-paid jobs outside the labour movement. The recommending trade unions can make their recommendation and support conditional on the commitment of the applicant to work in the labour movement at least for a number of years after finishing the course. However, this is difficult to enforce. Free and confident trade unionists will always make individual choices about their own future. Even if people take up other jobs, it is not necessarily negative for the labour movement.

Instead of trying to retain people through commitment agreements, the stronger persuasion has to come from a design of the programme that motivates continuous work in the movement. Studying with trade union colleagues from many other countries, having the time to reflect about trade union policies and getting new insights in the (political) economy of globalization is stimulating and motivating. An internship with a trade union organization is an integrated part of the course. It provides students with exposure to practical trade union work outside their home country and also links their academic studies with some "down-to-earth" practical trade union issues.

The experience from the first two courses is that most participants returned to trade union or labour activities at home. In addition, the GLU is building an alumni

network to encourage students to maintain contact over the years and to continue to work together.

Beyond internal networking the GLU needs to be embedded in broader information networks of trade union and labour research activities. The ILO is supporting an initiative of the international trade union movement to build a Global Union Research Network (GURN). The GURN (www.gurn.info) facilitates debate, research and information exchange on global labour issues. It organizes workshops, online debates, supports research and maintains a number of web sites to provide up to date information on important global labour issues. The students are encouraged to join this network which offers them the opportunity to link up with a wider group of labour researchers. It is too early to assess the success of the strategy of network integration, but proactive stimulation of further cooperation is seen as vital for strengthening the international debate and for supporting "retention" of the GLU participants in the wider labour orbit.

F. Why a residential course in the age of the Internet?

New technologies open new possibilities for e-learning and networking that allow for distant learning and time flexibility. In the age of instant global communication a residential course looks very old-fashioned. The advantages of distance learning are obvious. People can do this in a flexible manner and from their computer at work or back home. They stay in their workplace and maintain contact with their communities and families. While this has advantages, it has to be balanced against the advantage of a genuine sabbatical year that allows participants to step back from their day-to-day work and usual home life and look at the global challenges for labour from a different perspective. This period of an intensive process of learning and analysis from outside "normal life" is at the same time an important phase

for critical reflections and strategic thinking for the reality back home and how this reality adjusts to a broader picture of the world developments. An interesting dynamic of the GLU residential course is that some classes are run with students from other courses in the respective universities, giving GLU students the possibility to go beyond discussion among trade unionists and test the validity of their arguments with people from other backgrounds.

Distance education has also its own limitations. It is beyond the scope of this article to discuss the difficulties extensively. However, it seems that the interaction in a classroom is of extremely high value in a learning process and not easily created in a virtual class. The value of face-to-face meetings in understanding different cultures, debating openly, and learning from each other cannot be underestimated. Moreover, one year of living and studying together is much more than sharing experiences, as it transforms into an important phase for critically analysing and questioning political developments in trade unions and in society as a whole and seeking for solutions. At the same time it lays the foundation of valuable networks and relations among the GLU participants for cooperation in their future trade union work.

Distance education programmes are based mainly on written communication, which increases the communication barrier for non-native English speakers substantially. The discipline required from participants is extremely high and distance learning does not reduce (it probably increases) the study time required and very intensive individual supervision needs to be provided. Offering a full course Master's programme would require either that someone is nevertheless released from work duties, or would need to be stretched over a longer period of time.

Information technologies provide excellent possibilities to complement the course and networking activities. They are extensively used in maintaining the network, sharing information and teaching material among the universities and in

building an alumni network. A common web site provides comprehensive information about the project for a wider public. An internal communication system facilitates information sharing within the network. Course outline and course readings, bibliographies etc. are deposited on a common platform. Students can share their coursework and electronic discussion groups provide the possibilities for debates among student groups from different universities. The electronic platform is also increasingly used for communication between former students and provides good facilities for joint research activities. One of the challenges of the GLU remains to explore further the possibilities for part-time or distance education. On a practical note, adding the dimension of distance learning to the challenge of creating a complex multi-stakeholder Global Labour University network was seen as trying too much in one go.

G. Recognized Master's programme versus labour education and adult learning versus university teaching

Since the beginning of the programme, the question of whether the course should be a formal university course or a trade union course has been hotly debated.

Entry barriers to formal education for many workers, and the lack of recognition of experiences and informal learning, were important factors to reject formal entry requirements and exams in workers' education. The underlying assumption is that for trade union qualification programmes, formal qualification is not a very valuable criterion and is an inherent element of exclusion. It was also not seen as a necessary disciplining and motivating instrument as committed trade unionists derive their learning motivation not from marks but from vision. Finally, labour – for good and bad reasons – wants to keep full political control over the learning process.

However, the fact that formal qualification standards might require undesirable modifications to the curriculum and

the methodology of a course, is probably the most important reason against formally recognized courses. It gives more agenda-setting and control power to the teacher and is hence less participatory and democratic. This also individualizes the learning process as people are individually assessed. Learning in closed groups of like-minded trade unionists creates an environment allowing a focus on problems from a labour perspective and creates a less competitive learning environment.

These are valid arguments to maintain traditional forms of labour education. However, there are also a number of arguments to supplement "in-house qualification" with formally recognized high-level qualification programmes. The expertise and knowledge of universities can be used, and universities are best equipped to provide knowledge and academic analytical skills that enable people to back up their political views with well-reasoned arguments and underlying theoretical concepts. Universities are motivated through joint programmes to develop a stronger focus on labour issues. Being in a like-minded trade union community, in an open university environment, also reduces the risk of reinforcing the politically correct truth instead of debating the challenging questions.

Learning is not always fun and is often hard work. Participants want their hard work recognized. Certification and formal recognition provide additional confirmation of the value and quality of a given course. Recognized courses can also be an important stepping-stone for further learning and qualification. Integration into broader academic institutions can be intellectually more stimulating. The increased need for building alliances requires an open-minded environment for discussions and debate in qualification programmes.

Education has always been a central element of trade union work to develop, discuss, and disseminate new ideas. Labour pioneered many concepts of adult learning. It was one of the first to dis-

cover and value the importance of learners' experiences as important sources of knowledge. There is no given set of knowledge that needs to be transferred from the teacher to the taught, but all participants involved in the learning process bring their knowledge, experience and opinion to the table. The shift from bringing enlightenment to the workers, towards facilitating learning together, and from each other, has led to a language change from the partly paternalistic notion of workers' education to labour education, trade union training, lifelong learning, etc.

While discussion and sharing experience are important, they are certainly not everything and sometimes seem overvalued in labour education. Sharing practical experience is not a substitute for studying theoretical concepts and paradigms. Indeed, practical experience can also be misleading. Daily experience at enterprise-level makes the employers' argument that wage cuts increase competitiveness and create employment quite compelling. The negative effects on productivity growth, aggregate demand, or the upward pressure on the exchange rate, are beyond daily experience and require a different level of abstract thinking.

Humankind has accumulated knowledge and theoretical understanding over many generations and there is no need (and most people do not have the ingenuity of the few great thinkers each century produces) to reinvent the wheel. While sharing experience is important, and reflection indispensable, there is knowledge that needs to be learned from books and teachers and which cannot be assumed to be instantly derived from practical experience. The more distant the causes affecting personal lives, the more difficult it is to derive understanding and responses from personal experience, or from sharing personal experience. This needs to be taken into account in addressing globalization issues. There is a need to broaden the experience brought together. Global problems require global sharing of experience and knowledge. There is not only a horizontal, but also a vertical problem. Complex issues

cannot be understood without acquiring the accumulated wisdom of humankind. This is normally not found in classrooms, but in libraries. Despite new technology and new methodology there is no real shortcut to avoid long hours of reading which stimulate meaningful debate.

Universities traditionally have a more vertical or hierarchical tradition of learning and they are probably overestimating the knowledge transfer, and underestimating the need for critical reflection and debate. While professors enjoy the discourse with other professors, this does not necessarily apply to the same extent to students. Professors might not always see the value of students questioning their wisdom and methodology.

Adults are prepared to learn – they do not want to be taught. People do not learn what they are taught, but what they want to understand. Adults have their own interpretation of the world and they respond on the basis of that view to any new information. It is an illusion that knowledge can be transferred without reflection, debate and discussion. Sending and receiving a message are only two loosely connected activities, whereas common understanding can only be ensured through discussion and reflection. In some lectures, students clearly felt a lack of participatory exchange with the professors and, in several discussions, the two different learning cultures and expectations were debated. Finding better solutions is a joint, and not always easy, discussion process.

The GLU already successfully facilitated a “clash of learning cultures” and maintains the Hegelian optimism that thesis and antithesis will be *aufgehoben* (will lead to) a qualitatively higher synthesis.

Conclusion

The speed of globalization is not slowing down and the need for a global solution is growing by the day. The apparent “Washington Disarray” offers a window of opportunity to broaden the debate about alternative forms of globalization. To seize this opportunity requires sustainable global networks and international movements as prototypes of a global civil society. The Global Labour University is trying to make a contribution to this process by focusing on the social and labour dimension of globalization, building international links between academia and the labour movement and qualifying trade unionists on global labour issues.

Overcoming language and cultural barriers and supporting an open, but value-based, research and learning environment is seen as a valuable contribution towards a modern labour movement trying to influence complex and differentiated globalization processes.

Labour has a key role to play to make globalization fair. At the end of the day, the broad involvement of working people will make the difference between whether ideas remain just ideas or whether they will change the current reality.

Educating for equality – Workers' education and gender

More and more women are joining the unions. Has workers' education kept pace? And can it help women trade unionists into leadership positions? What should gender-sensitive labour education look like? We asked an expert. Elsa Ramos, who has long experience of trade union programmes for women worldwide, was formerly the Director of the Equality and Youth Department of the ICFTU (now the ITUC).

Elsa Ramos

Specialist in Workers' Activities
Asia-Pacific region
ILO, Bangkok

Labour Education: Women workers still seem to have too little access to positions of leadership within the trade union movement. Can workers' education help women to break through the glass ceiling that is also found in the unions?

Elsa Ramos: Yes it can, in so far as it prepares women for leadership positions. Workers' education gives women the skills to tackle the myriad tasks facing trade unionists – whether they are rank-and-file members, shop stewards, representatives or leaders. However, all the education in the world will not have much effect if sexist attitudes and behaviour persist, if stereotypes of male and female roles continue to be reinforced in the structures and culture of trade unions. Everywhere today we have well-trained, experienced women, extremely able and willing to lead their unions. Dare I say it – they are better than some of our male leaders!

However, few women get the chance even to get to first base in the leadership contest. For those able to overcome the hurdle of their often heavy family responsibilities, there is – still in many parts of the world – the stigma attached to a woman “doing a man's job”. It's all right for women to be union members, even active members, but leadership in

the unions – a very “public” domain – is the business of men. Unfortunately, far too many of our brothers still think like that. Just recently, a top leader of a national centre in Asia (fairly young, too) said to me: “My wife would like to be more active in the union and run for elections, but I'm really sorry that I have to discourage her. She'll have to attend meetings, sometimes out of town, and maybe even take part in collective bargaining, which often goes on until the wee hours of the morning. Who will take care of the children?” It didn't occur to him that he could also take care of the children and, more importantly, that his wife would probably be a very effective negotiator, women being “naturals” for this job.

So what can be done to change attitudes inside organized labour itself?

There is a crucial need for “genderizing” the trade unions. In the mid-90s, the ICFTU evaluated the “women only” programmes and what impact these had had on the women and on their trade unions. While they had been extremely beneficial to the women (of course!), the “value added” for the unions was in terms of more participation by women in trade union activities (at local and federation levels), more

organizing efforts targeted at women (and hence, more women members, in particular those in the informal economy and the export processing zones), a strengthening of women's structures, and union women taking on more active, often leadership, roles *outside* the unions (in women's organizations and NGOs). In fact, quite an achievement! Still, full integration of women's – and gender – issues into trade union policies, programmes and activities, was judged to be wanting, woefully in too many countries. And where the impact was the least felt was on women's participation in decision-making bodies *inside* the unions. This was, to say the least, most discouraging, especially as positive action policies and programmes had been adopted – not without debate – by the ICFTU and its regional organizations.

After much discussion involving the Task Force (set up by the ICFTU Women's Committee to monitor implementation of the positive action programmes), the regional women's coordinators and education officers, and some national centres, a three-year pilot programme was developed to train union educators – both men and women – to conduct gender awareness training within their organizations and integrate gender perspectives in general trade union education programmes. And each national centre selected for the pilot project was to set up a national Gender Perspective Team – on a gender parity basis and with the active participation of the women's committees – which would develop a national gender policy and a strategic plan of action for its implementation. The project countries included Burkina Faso, Ghana, India, Kenya, Malaysia, Mali, Morocco, the Philippines, South Africa, the United Republic of Tanzania, Tunisia and Zimbabwe.

And has that education approach worked?

The project was evaluated in 2003. One positive finding was a perceptible increase in gender awareness and better understanding of gender issues among educators, organizers and youth activists – and

to a lesser degree, among leaders. The discussion and subsequent adoption of gender policies and plans of action by national centres were also attributed to the project, as were some amendments to constitutions to promote women's participation in executive boards. And, last but not least, the development of education and information material was noted. But much is still needed to be done to implement the plan of action, not least finding the necessary resources to sustain the activities. Also, there remains a huge gap between rhetoric and practice; clearly, the political will to change is wanting.

In Latin America and in Central and Eastern Europe, the outlook is more optimistic. More and more women are in leadership positions, at all levels. ORIT, the ITUC's regional organization for the Americas, has gone beyond the 30 per cent minimum women's participation in activities threshold set by the International; the average is now 40 per cent. And after Western Europe, the Americas has the highest number of women in union leadership positions.

Today, more and more women workers are joining the trade union movement. Have the services and training provided by the unions changed to take account of that?

Yes, but not enough.

It should certainly not be thought that unions did not provide services and training for women in the days before the 1970s. Even when they represented a small percentage of the membership (7 per cent in 1949, when the ICFTU was founded), women already knew that their place was in the union and that the union was theirs, too. So they had a claim to these services and training, as much as their brothers. But they also realized that for this to happen, they had to get more women into the unions, build a critical mass, create their space and slowly transform the movement, not only for themselves, but for their brothers and for all workers. I call these early years the "planting-the-seeds phase". Many sprouted, because they were

constantly tended by the Women's Committee – founded way back in 1952! – and by women (and some men) trade unionists all over the world.

From the mid-70s to the late 1990s, there were a great deal of projects and programmes aimed at organizing and integrating women into the trade union movement, in both industrialized and developing countries. This was no doubt fuelled by the strong women's movement all over the world, given impetus by the UN Decade launched in 1975. That movement influenced even the hitherto extremely patriarchal trade union leadership and structures. Of course, a lot of the credit must go to the trade union women who have always had to fight an uphill battle for their place in their unions. But their struggle was given a much-needed feminist perspective through their interaction and alliance with their sisters in the women's movement. At the same time, union women greatly influenced the women's organizations and NGOs. They learned a great deal from the militancy and daily struggles of women workers for equality at the workplace, tackling issues such as equal pay for work of equal value, equal treatment in employment, trade union and human rights, maternity protection, balancing work and family, sexual harassment, and violence against women. The small and big victories we enjoy today are the flowers, plants and trees produced by the seeds planted earlier.

Was workers' education among the seeds?

It was one of the most important ones. During those years, the programmes and projects were mainly for women only, and most were in the area of training and education. Great focus was placed on raising women workers' awareness of their own worth and the value of their contribution to society, including the trade unions, while imparting the ABC of trade unionism. The multi-level programmes included skills training on the various aspects of trade union work (organizing, collective bargaining, labour legislation, union ad-

ministration, with a special focus on decision-making and leadership) as well as on specialized subjects (economics, research, structural adjustment programmes, etc.). Thousands and thousands of women benefited from the training which, in developing countries, was made possible to a large extent by solidarity assistance from unions in industrialized countries. Thousands of unions, in turn, benefited from the women who applied their skills in strengthening their organizations, organizing more women workers, making much-needed changes to the way trade unions work and transforming union structures and cultures to be more inclusive and diverse.

These programmes, which continue in many parts of the world, have chalked up some obvious successes – greater visibility of women, a better image for the unions as inclusive organizations, more women joining the unions, more credibility for the unions as effective organizations addressing more than bread and butter (or rice and fish) issues, and so on. But nevertheless, the pace of change is still too slow. Nowhere is this more evident than in the still very low percentage of women in decision-making positions.

To what extent does workers' education currently take account of the different needs of men and women?

Not enough – especially at the “higher” levels, such as the specialized courses of longer duration at the International Training Centre of the ILO, Turin. The problem is that labour education associates the notion of “leadership” with top, elected officials. That does not reflect either women's thinking or women's reality.

What should gender-sensitive workers' education look like?

It requires culturally sensitive trainers. For example, they should obviously take care to avoid sexist language. For gender awareness training itself, it is preferable to have both a man and a woman among the trainers. At the same time, we should

realize that the gender issue may have to be approached differently in different parts of the world. So culture and traditions have to be respected, but we should not be afraid to examine them critically. It is also important to take a close look at the materials used for labour education. At the very least, it should avoid stereotyping. If it can actually enhance positive roles, so much the better. Checklists of gender issues can help to make sure they are properly covered in courses.

And, of course, we have to make sure that more women take part in training activities. Thirty to 40 per cent should be the threshold. This implies that the organization of the courses should be adapted to women's needs. Are the timing and the venue suitable? Is childcare provided? Are the needs of nursing mothers taken into account? Generally, mixed courses are preferable, as they help both women and men to be aware of gender issues. But in some cases, women-only courses may be needed. Again, this is partly a cultural issue.

As regards the content of courses, gender aspects should be built into all the topics. For instance, *the* topic today is globalization and its impact on workers, their families, society and national development. Courses on globalization need to cover issues like migration, export processing zones and outsourcing. In all these areas, women are very much involved and have particular concerns. The same goes for occupational and health and safety, HIV/AIDS in the workplace, labour market reform and a whole host of other topics.

Can you indicate a particularly good example of how the needs of both men and women were introduced into workers' education?

Public Services International (PSI) has developed a lot of useful material. Its publications on pay equity go into the practical issues in a way which makes them ideal for labour education. Also, together with Education International, it has produced pay equity modules specifically designed for training courses. These manuals can then be used in conjunction with other resources. PSI also has material explaining what gender mainstreaming is, and it goes in for gender mainstreaming itself. For instance, it has resources on the link between gender inequalities and health and safety concerns.

And UNI's Global Equality Project (GEP) has placed the emphasis on the education and training of women trade unionists. The GEP workshops in Africa, the Asia-Pacific region and Latin America have been using active learning techniques. They also bring in women trade union leaders and activists who attended previous seminars, and who can serve as role models. The women who attend these seminars go on to organize more women into trade unions. That in turn gives them the strength to promote equality at all levels of the trade union movement and in society as a whole.

The workshops also make the link between gender equality and the ILO's Decent Work Agenda. That link is as clear as it is vital.

Trade union education in Africa – Challenges and future prospects

Trade unions were established by workers to represent, protect and defend their collective social and economic interests. However, given the complex dimensions that these interests have assumed due to global economic and socio-political environments, the case for continual relevant and strengthened learning processes for personal and collective development has become an unrelenting imperative within the labour movement in Africa. It is therefore critical that trade unions uphold the value of education with a view to addressing these challenges and justifying their existence.

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Trade union education has formed an integral part of trade union activities since the advent of international trade union activism in Africa in the 1950s. Labour education reaffirms the identity of the organization while at the same time upholds its main objectives. And although it has taken many forms, the primary aim has remained the promotion of the labour movement's core principles, values and ideals. Trade union education is indeed the overall strategic instrument that allows workers collectively to realize their capacities in promoting, defending and enhancing their interest. At the same time, it provides an avenue to analyse its position vis-à-vis the social, economic and geopolitical situation surrounding its environment and the workplace.

The nature and form of trade union education in Africa has substantially been influenced by the changes that have affected the world of work. The world economy has been undergoing dramatic changes at a breathtaking pace in the past

two decades. These changes are largely due to globalization of the world economy, the failure of African economies to create employment opportunities at a time when workers are losing jobs through restructuring programmes, the informalization of employment and the opening up of new political systems. In effect, these changes have necessitated trade unions to be strong and build the capacity to engage governments, employers and other development actors.

This being the case, trade unions needed to broaden their base and build up a wider appeal. This requires organizing more members in the formal sector and especially among women and young workers. They also need to extend their organizational representation to sectors that have so far not been the traditional base of trade unions.

Trade union education has enabled members and leaders not only to understand new trends in social and economic development, but also to engage

employers, governments and international organizations – to ensure that the labour movement viewpoint is heard.

Development of trade union education in Africa

The three phases of trade union development in Africa are: colonial, post-colonial and contemporary.

The colonial period starts in the 1950s with the concentration of educational activities especially in East, North and West Africa. These activities were largely meant to awaken the consciousness of workers on the need for collective efforts to defend their interests, instil trade union principles of unity to ordinary workers, and develop trade union leadership that could handle workers' problems. The activities were organized largely on a subregional basis, often lasting two weeks to a month. They were mainly organized on an ad hoc basis. The methods of teaching and the materials used were often based on the experiences of trade unions in the respective colonizing countries. To a large extent, due to the low levels of literacy of the African workers, the language used to deliver the message was, in many instances, not easily understood by the majority. Nonetheless, the message on the need for unity and solidarity was clear to most: the more the colonial governments and employers resisted the development of trade unions, the more the spirit of trade unionism grew.

This early period was also characterized by an increase of worker participation in the struggle for independence. At the international level, the optimism about the future of trade unionism in Africa was also reflected in the decision by the International Confederation of Free Trade Unions (ICFTU) to establish a permanent educational institution: the African Labour College in Kampala, Uganda. The college had an immediate positive impact on trade union education in Africa. It created an environment where young trade unionists discussed issues facing them at home, and shared ideas on how to deal

with them. There is no doubt that it gave impetus to the development of a vibrant trade union movement that was articulate and aggressive in presenting its demands. As a result, the ICFTU was encouraged to start the process of building another college in Abidjan, Côte d'Ivoire.

The second, post-colonial phase of trade union education took effect as soon as many countries in Africa gained their political independence in the early 1960s. The struggle against colonial rule had obviously revealed the trade union capacity to mobilize workers for specific goals. The nationalists, who had worked closely with trade unionists but had replaced colonial governments upon winning the struggle for independence, moved quickly to establish one-party regimes. It was argued then that trade union independence in the face of a war against poverty, disease and ignorance was a luxury that no African country could afford. Africa, it was said, needed to unite its people under one leadership. The relentless rhetoric mounted by the politicians put trade unions on the defensive as they had not prepared themselves to fight back. Arguably, it was during this period that trade unionists in Africa faced enormous political pressures. The African Labour College in Kampala was also under attack and was forced to close down in February 1968. The idea of opening a new college in Abidjan also fizzled out.

This new political dispensation called for a review of overall trade union strategies. Trade union education was then targeted to reach the ordinary workers at the branch and shop-floor levels. This stage of "mobile trade union education programmes" was born in the early 1970s and involved basic trade union training for shop stewards and branch officials, intermediate courses for district and national leaders or specialized training at national level, and training of national leaders geared to the formulation of the trade union movement's economic and social policy.

At the same time, the new approach recognized the role of international trade union solidarity through the closer collaboration and coordination of educa-

tional activities, including exchange and production of teaching aids with sectoral unions and at the international level. Inter-regional activities were also initiated in order to provide opportunities for education instructors to compare experiences and learn from each other.

One of the most successful approaches to trade union education was carried out during this period, under the monitors' training programme. This called for the development of a programme to be carried out in stages, with clearly defined objectives. The organizers also stressed the importance of selecting participants who were likely to assume active trade union work. It became obvious that such activities could not be achieved in countries where trade union education structures did not exist. It was emphasized that trade unions needed to determine their priorities, design programmes, select participants and carry out the requisite activities. This approach led to intensive activities aimed at establishing structures for trade union education.

The contemporary phase of trade union education in Africa began in the 1990s, which was characterized by the intensified democratization process, debate on good governance and internal trade union democracy, economic reforms, globalization and emergence of new technologies and the HIV/AIDS pandemic. This opened up the possibilities of African trade unions to break away from the often imposed links they maintained with the one-party regimes. Trade unions were at last free to join any international trade union organization.

This period also saw the emergence of issues such as gender mainstreaming, structural adjustment programmes, human and trade union rights and child labour as major priorities for the trade unions which had to be included in educational activities. Some of the educational work took the form of costly regional conferences. At the same time, trade union education had put more emphasis on training specialized staff and established a cadre of educators in virtually all trade union centres. The work on the production

of educational materials also expanded to other areas that had hitherto not been covered.

The third period also saw the incorporation of requirements that educational support should assist trade union organizations to develop the services they provide to members and aim at involving working people in the activities of their unions. Increasingly, education materials were translated into non-European languages, such as Kiswahili in East Africa. In addition, educational activities at the rank-and-file level were conducted in local languages, thereby facilitating a greater absorption of the information being delivered to participants. The application of different trade union education methodologies also intensified and methods such as study circles became common knowledge.

Today, with the advent of information and communication technologies, and particularly the Internet, a new dimension has been brought to trade union education. Educators are now considering themselves as architects and engineers constructing the bridge to the so-called "digital divide", for the benefit of unionists and their communities. Trade unions, as significant interest groups in the communities, are also developing a regional and national presence as part of the global information society. As in many other social and economic issues affecting modern society, trade union educators are playing the roles of advisers, teachers and advocates to a mix of citizenry with varying, often limited, levels of technological knowledge. Educators argue that, in their position as the line of defence for their membership and the general populace, trade unions are probably better positioned to sell the benefits of the digital age than most self-proclaimed, undemocratic, rigid and unfocused civil society institutions.

It is also noteworthy to observe that Africa contributes to more than half of the countries that have ratified the Workers' Representatives Convention, 1971 (No. 135) (see table). This Convention and its accompanying Recommendation No. 143 are important tools to enhance

Africa's ratification status of the ILO's Workers' Representatives Convention, 1971 (No. 135)

Country	Date of ratification
Algeria	6 June 2006
Benin	1 June 2001
Burkina Faso	21 May 1974
Burundi	10 October 1997
Cameroon	5 April 1976
Chad	7 January 1998
Democratic Republic of the Congo	20 June 2001
Côte d'Ivoire	21 February 1973
Egypt	25 March 1982
Gabon	13 June 1975
Guinea	26 May 1977
Kenya	9 April 1979
Mali	12 June 1995
Niger	5 April 1972
Rwanda	8 November 1988
Sao Tome and Principe	4 May 2005
Senegal	24 August 1976
United Republic of Tanzania	19 August 1983
Zambia	24 May 1973
Zimbabwe	27 August 1998
Total African countries: 20	
Total all countries: 78	

Source: ILOLEX database (as at 12 September 2006).

the role of trade union education because they ensure that workers' representatives and educators enjoy effective protection against any act prejudicial to their duties. These tools are also important in that they compel ratifying countries to provide facilities to workers' representatives, to enable them promptly and efficiently to carry out their functions.

Scope and content of trade union education in Africa

In order to establish itself clearly as one of the most influential services that unions provide to their members, trade union education should be properly designed and implemented. In this regard, the scope

of trade union education in Africa has always been unique and its approach different from any other form of adult education. Its scope and content are designed to create and also raise awareness among union members, activists and leaders as well as providing them with skills to meet the difficult challenges of their workplaces and organizations.

Increasingly, trade union education is organized with the aim of educating target groups and making them supportive to their organizations and better performing. It is in this context that trade unions have a traditional obligation to ensure that their members are satisfied with the education offered.

In this regard, while trade union education in Africa has concentrated on labour-

related subjects, the activities have not entirely been limited to “bread and butter” issues, such as collective bargaining and wage negotiation, but have also included a wide range of many other questions important to workers and their communities.

There are three broad levels of trade union education – basic, intermediate and advanced. These three categories cover subjects such as: trade union history, aims and objectives of trade unions, handling members’ problems, some aspects of labour law structure and the functions of trade unions, collective bargaining, health and safety at work and the duties of trade union officers (shop steward, branch secretary, branch chairperson, treasurer, etc.).

Other specific subjects may be added. They include trade unions and the economy, human and trade union rights, women’s participation in trade unions, ILO Conventions, international trade union organizations, leadership skills, strategic planning, organizing and public-speaking techniques.

In various forums, trade unionists have reviewed the relevance of the scope and content and concluded that, to a large extent, trade union education has succeeded in preparing leadership to perform their duties and also informing membership of their rights and obligations. The subjects covered in the learning process were also considered adequate in relation to current challenges.

Nevertheless, for labour education to be more responsive to the dynamic changes of trade liberalization, privatization and retrenchment, advancement in technological developments, increasing cases of violation of human and trade union rights, it is necessary to initiate deliberate improvements in the curriculum by raising awareness on the need for acquisition of new skills, facilitating the strategic networking and alliance between labour educators and the larger civil society and sensitization and building of trade union militancy.

The challenge to respond dynamically will call for the introduction of non-traditional courses such as democracy and good governance, entrepreneurship de-

velopment, information technology, international trade, trade union and politics, political economy, the environment, social and cultural values, and young workers.

Methodologies and approaches of trade union education in Africa

Trade union education is always focused on identified target groups within the organization and can assist in the resolution of identified problems. Thus, methodological planning approaches are important in meeting the targeted relevance of the courses desired. However, the methods, techniques and materials are means and not ends. The end is the type and the quality of learning.

In Africa, trade union education seldom takes place within the confines of a traditional classroom. Unionists, their leaders and the facilitators interact through attending meetings, study circles, field visits and group discussions in workshops (colloquially described by many trade union educators as “a shop that works”) aimed at strategizing the way forward on issues closer to their welfare and that of the larger communities in which they live.

A variety of participatory or active methods are applied, as well as passive techniques, including the lecture, the discussion, the forum, the large group discussion, the buzz session or small group discussion, case studies, role playing, study circle and others. In effect, all these methods are considered relevant, depending on the choice, objectives and target groups.

In terms of other appropriate methodologies and approaches needed to make trade union education more responsive and dynamic in the context of the new challenges facing the trade union movement, it is necessary for workers’ education to adapt to the new opportunities and potential associated with information and computer-based technology, such as the use of electronic media, the Internet and CD-ROM. In addition, trade union education must be called upon to take up the challenges posed by the changing

political platform by introducing new political dimensions such as the impact of national and international geopolitics on trade union work.

It is also critical to call for the adaptation of current methodologies and approaches to take account of other innovative techniques of education and learning such as drama, traditional songs, and use of radio and print media. It is equally important to use research as a learning tool to enhance awareness of current and future trends affecting workers.

Trade union education has always taken many forms and has constantly had to adapt to new situations. But its basic principles have remained strictly adhered to. Specialized training has sought to meet the specific needs of trade unions and to be relevant to the types of people it is aimed at. Importantly, trade union education has also been instrumental in contributing to the development and strengthening of international trade union solidarity.

Challenges facing trade union education in Africa

Concomitant to the obstacles to trade union growth already identified (global economic reforms, technological advancement, drastic change in climatic and environment changes, and labour market dynamics) trade union education in Africa is undergoing teething problems.¹ For instance, trade union educational activities remain heavily dependent on outside financial resources. Moreover, these foreign sources are shrinking while demand for them continues to grow. This means unions have to take certain bold steps, among other things, by having to do so much with so little. Trade unions must, as a matter of urgency, take appropriate measures to address this issue.

National trade union centres and their affiliated organizations need to value education by explicitly budgeting for basic training activities within their respective organizations. Unions should also be encouraged to undertake educational activ-

ities through extra-budgetary resources by designing project work that could be fundable from external support.

At the same time, unions need to pull resources together to offer advanced training at specially designated institutions such as the labour colleges, most of which currently have excess unutilized capacity. There exist various national labour colleges in Ghana (Ghana Labour College), Kenya (Tom Mboya Labour College), Senegal (Innefo), South Africa (Workers' College and Distela) and the United Republic of Tanzania (Mbeya Labour College). This process of institutionalization of educational structures can help promote learning and studying in the labour movement by organizing seminars, outreach programmes, academic and non-academic courses and discussions. This will also assist in the promotion and implementation of comprehensive education and training programmes for the trade union movement. Strategic liaison with institutions of higher learning in their respective countries should also be encouraged in order to secure additional support for programmes. Equally important are the links with the media, representative and democratic non-governmental organizations, United Nations agencies and academic institutions. Such linkages can also facilitate the integration of union agenda into programmes developed by other actors.

In terms of utilization of human resources, trade union education should not be restricted to educators and trainers from labour education departments, but also take advantage of the existence of the knowledge and skills available in other departments such as economics and research, gender issues, trade union rights, administration and finance, communication, and organization.

Other challenging areas that have influenced the face of trade union education include: management of trade unions as modern institutions, new services to members, and issues that are of concern in contemporary society, such as employment creation, policy development, entrepreneurship, management, project design,

planning and evaluation, child labour, HIV/AIDS, the environment, international conflicts and corruption.

Summary, conclusions and future prospects

Trade union education is, and will continue to be, an important part to the realization of the principles and ideals of the labour movement in Africa. However, just like the movement itself, trade union education must continue to be dynamic. It must change and adapt to new situations and challenges. It should be innovative, experimental and responsive to the needs of the diverse target groups that constitute the movement: shop floor activists, young workers, women, and leaders.

Nevertheless, trade union education must not be seen as the panacea to all the problems and challenges facing the trade union movement. It is an important vehicle for the movement to use in creating awareness and searching for solutions to the myriad of issues afflicting trade unions: promoting organizing campaigns, fighting the HIV/AIDS scourge and other social evils, resolving leadership issues, encouraging youth to join unions, mainstreaming gender aspects and enhancing solidarity. Trade union education should, therefore, not be an end in itself.

Though much has been achieved in Africa, trade union education must still be nurtured to meet the following challenges:

- develop information-gathering methods, storage system and dissemination, including the continual adoption of new communication strategies and the application of new skills;

- build new capacity to assess strategies to improve the membership base for all affiliates;
- assess the role of workers' education in knowledge creation, storage and dissemination, including enhancing skills development and attitudinal changes;
- make trade union education catalytic and pragmatic, both in content and methodology;
- develop cost-effective methods of delivery which take into account non-conventional approaches, including mobile exhibits, street forums, distance education methods, concerts, popular theatre, folk and mass media. However, it should be clear that trade union education is a discipline of its own merit and should not lose its identity;
- make trade union educational institutions, educational materials and resources to respond to the new challenges; and
- harness the role of the International Training Centre of the ILO, Turin as the centre of excellence in trade union education and increase its collaboration with various regional and national labour colleges in Africa.

Note

¹ For a succinct discussion of the challenges facing trade unions in Africa, see ICFTU-AFRO (2005), *A Trade Union Vision for Africa towards Challenges of Development, Organizing and Social Justice*. (Nairobi, ICFTU-AFRO).

Trade union education in Asia

The challenges to trade union education in Asia are those to trade unionism in general. Some of these challenges relate to trade unions, their actions and structures, others to external pressures to which the actions and structures must respond. Further, some challenges flow from how we have conducted trade union education.

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With the collapse of communism, the only ideology in the field holds that “good economic performance requires liberalized trade, macro-economic stability, and getting prices right” and that “private markets will allocate resources efficiently and generate strong growth”. This presents significant problems for trade unions.

The ILO view that *labour is not a commodity* finds no acceptance in this new ideology. The trade union concern that economic efficiency be tempered by humanity, fairness and security are seen as restrictive trade practices.

External and internal pressures on trade unionism

Globalization has augmented the capacity of corporations while further weakening the ability of trade unions to organize. Corporations can manipulate subcontracting, supply chains and production networks as they expand globally.

Employers are increasingly likely not to recognize trade unions, often perceived as an external third party coming between them and their workers. Even where employers accept trade unions there is a tendency to limit their scope to single workplaces (especially in Asia). In

Thailand industry unions are legally permissible but most employers follow the Japanese way of dealing only with those organized workers in their own employ. In many countries trade unions face major obstacles when seeking registration, such as unnecessary delays, bureaucratic interference and cronyism.

It is also increasingly difficult to gain trade union education leave. This is, in part, because companies try now to operate with far fewer staff (to be “leaner”). It is also because the ideas included in the ILO’s Paid Educational Leave Convention, 1974 (No. 140), which covers vocational, trade union and civic education, are now largely ignored. This makes face-to-face training far more problematic.

Governments (especially in countries in transition to a market economy) mandate many terms and conditions of employment and some (particularly multinational) companies offer good terms and conditions, thus limiting the *need* for trade unions. This has become more obvious in the general economic expansion since the 1997 economic crisis in Asia. A period of continued growth has seen trade unions unable to regain some of what was lost in the years after 1997. “Contract” workers on lower wages and conditions work side by side with what remains of the “permanent”

workforce from 1997 after more than five years of renewed growth and advancement. Despite this growth, there has been an increase in non-standard (informal) forms of employment. Workers are now casual, contractual, dispatched (employed indirectly via agencies), outsourced, part-time, seasonal, and project-based.

Thus trade unions are weak and have limited structures. Unfortunately, legislation often encourages weakness by allowing competing organizations to flourish, thus limiting the unions' strength. Examples of this are the multiple national trade union centres in the region. With relatively low union density and small organizations the unions lack internal resources both human and financial. Meeting the demands of registration is time-consuming, especially as turnover of mainly part-time representatives is often high. Few unions in Asia are able to charge one per cent of wages as union dues and collection is also time-consuming. With the decline of trade union membership in the developed economies a further source of financial and solidarity support has been severely restricted. Governments sometimes have transferred resources from trade unions to non-governmental organizations (NGOs).

Trade unions sometimes find themselves in competition with NGOs. These are often better resourced from government as well as private sources. Sometimes, they are able to take a role in influencing employment conditions through customer standards. Thus workers in some developing countries may gain decent pay and working conditions, not through their own organization, but through the influence of customers in the third world and NGOs that can gain access to workplaces where trade unions cannot. These organizations are not representative and do nothing to advance growth of democratic skills among workers. Some NGOs seek to work with trade unions but many do not and trade unions are often unwilling to work with NGOs.

Finally, in many developing countries there are poor welfare systems and, for

workers who are injured at work or who contract an occupational disease, there is limited rehabilitation, especially vocational rehabilitation, and workers' compensation seldom meets the actual cost of injury or disease. Social justice has always been of concern to trade unions but their standing as social partners has been weakened by the end of the mid-twentieth century compromise (which saw acceptance of trade unions as a means of avoiding the spreads of communism).

What does the present climate mean for trade union education?

There are many issues for which education would be an effective tool for strengthening trade unions and assisting them to be more effective. But the declining income from membership dues and from external sources (mostly international trade union solidarity and development cooperation from some governments) means that trade union education is more limited. It is seen by many unions as a peripheral issue.

Further, for the past 20 years or so the focus of most trade union education has been on trainer training. Although there are a significant number of trainers, the problems with this approach are:

- Many of those who have been trained to be trainers are those who previously would have attended leadership or skill-based courses to learn how to be effective unionists. Yet, after trainer training they are expected to return to their trade unions and conduct trade union education.
- Many trainers see themselves as, at best, course directors who organize guest speakers and introduce them but have little direct effect on training outcomes.
- This perception is almost certainly because they lack the experience necessary to train effectively. It is difficult to conduct effective training unless you have some appreciation of what you are training about.

There is often a greater focus on *issues* (globalization, ratification of conventions, child labour, HIV/AIDS) when many union representatives lack the *skills* and *knowledge* to deal with the basic operations of the union (recruiting new members, collecting dues, controlling monies, administering the union, gaining recognition from employers) let alone how to negotiate collective agreements, handle grievances or take cases to various legal institutions. Skill-based courses or leadership development almost no longer occur.

Further, there has been a focus on organizing and campaigning with a stress on building a movement. Unfortunately, this has meant that basic skills and leadership training has been ignored. Getting the balance right is never easy.

Too much of trainer training has been about “designing” courses or “writing” materials and too little about *presenting* courses. This is particularly a problem if the main experience of trade union education has been attending issue-based courses at which a variety of “experts” address the course and where a course director does very little to ensure that what has been discussed is turned into some coherent understanding of the implications for trade unions. Trainers are not merely course directors. They should be capable of presenting effective learning sessions and should have clear aims and objectives for their training sessions.

There are few resources for trainers when they return to their organizations from a trainer training course. Often they are the only persons with an interest in trade union education and they, consequently, get no support or encouragement. Further there are few or no financial resources so that they can conduct training. There is competition for access to ever more limited resources. So organizations seek funding for themselves.

Given the problems noted above there is a tendency to “overtrain” in some organizations simply because it is important to spend the financial support within the organization; seeing any of it go to other trade unions in their country is likely. This

happens at regional as well as national level. In addition funding organizations are in competition with each other. As a consequence few really long-term or integrated activities occur.

It should be possible, for example, to have one funding agency train trainers and another funding the trainers to carry out training on their return and, possibly, a third to fund evaluation.

Trainers can be more effective if their initial training (followed after some experience by training in design and management and in writing materials) is in *presentation* and if they also have access to well-designed training materials. There are quite a few such resources but, for trainers, *accessing* them is also a problem. More emphasis upon online access will be critical in the future. However, such access suggests that publication of manuals and books (which is expensive to produce and to distribute) should be a lower priority than in the past.

Despite this heavy emphasis upon trainer training there are no databases to identify them and to form a basis for a network of trainers who can be encouraged to conduct training and to access the online materials. Knowing what exists and what trainers offer is an important step in determining what can be done. Thousand of activists have been trained by unions at the local and national levels, the ILO, the Global Union Federations (GUFs), or the International Trade Union Confederation (formerly the International Confederation of Free Trade Unions and the World Confederation of Labour) in the past 30 years or so. Many of those who have been trained received no further support.

Are there new developments in trade union education?

There are very few truly new developments in trade union education. What has occurred in the past few years is that access is potentially far easier and greater. Before discussing this issue it is important to review what key tools are available to

trainers, their organizations and whoever is funding their activities.

First, it may be useful to try to establish some clarity about types of courses and the range of learning activities related to them. Often terms are used interchangeably and are unhelpful in assisting nominating organizations to identify appropriate participants. Examples of different course types and typical learning activities are:

Seminars in which participants are provided with information and are expected to have the experience to make appropriate use of it. Seminars are usually of not more than one to three days in duration.

Workshops in which participants are assisted to develop policies and strategies to deal with a range of issues. The expectation is that the participants have the knowledge and experience to achieve the objectives of the workshop with appropriate guidance. May be up to five days in duration.

Skill-based courses in which participants learn and practise the skills covered in the course. May be up to two weeks in duration.

Development style courses in which participants are exposed to a range of information and learn analysis, policy development and report-writing skills. The course is designed to lead to improved attitudes and behaviours. May be up to two or three months in duration.

Discussion groups/study circles in which participants take part in discussion in small groups after being provided with basic information about an issue. They require skilled leaders/facilitators and support materials to lead the small groups in discussion. Participants develop self-confidence in clarifying and expressing ideas. May be up to three hours in duration but usually 30–60 minutes.

A programme of training by regional and national organizations could include elements of all of these types of training.

Active, participatory training

Ideally all trade union education should be active and participatory. It should work on the principle of IPR: *Information, Practice, Review*.

Active learning ranges from mini-lectures with interspersed questions to participants, through to buzz groups, small groups, role plays, field trips and case studies. It is important when using these techniques for the trainer to have clear aims and objectives against which to assess responses, and to draw together disparate responses into a coherent composite. Reports from small group activities and case studies cannot be simply accepted, they should be analysed. Similarly with role plays, participants must be actively involved in developing, for example, a checklist for interviewing members with a grievance, then preparing and carrying out a practice interview, followed by a review of the practice using the checklist. Debriefing of role plays needs to focus upon the intended learning outcomes and on ensuring that any tensions are eased.

Modular training

When paid trade union training leave was more extensive, courses were conducted during working hours and were usually of several days duration. Given the greater difficulty of organizing face-to-face training in which the employer pays wages, training is more likely to be organized at weekends and evenings. Consequently, it makes sense to develop modules of training that can be conducted in 2–3 hours (they should still use IPR). Trade union representatives should be able to access the skills or knowledge previously acquired over several days by attending a range of modules over a more extended time period. Of course, this is more taxing on trainers and their organizations as many more activities must be arranged.

Distance learning

As face-to-face learning becomes more difficult, distance learning becomes more viable. However, it requires two components to be effective:

- (1) There are suitable materials for distribution to participants. Suitability includes that they are topical, deal with typical issues facing the participants and readable. These materials include: information, and assessment tasks (practice). The review phase of IPR may be conducted by participants returning work sheets for comment or by providing model responses after completion. Assessment tasks may include:
 - responding to questions
 - finding information (e.g. copy of collective agreement, Material Safety Data Sheets (MSDS))
 - developing a submission for presentation (to management, union office, government)
 - developing a draft policy/motion for a meeting
 - responding to case studies
 - surveying members, etc.
- (2) Some self-assessing components. If there are a number of lessons which participants must carry out and return to the trainer before proceeding to the next lesson the trainer must be able to respond quickly or participants will lose heart. But this is costly in time and may be costly in financial terms as well. Distance learning is more expensive the more participants stick with the lessons! One method may be to make the early lessons self-assessing but require a final response to be submitted that includes, for example, a review of the whole programme through multiple choice questions and a written response.

A modular approach may make distance learning more effective allowing there to be fewer lessons on each topic but, as

with modular face-to-face learning, more effort may be required to make topics free standing.

It should be remembered, however, that distance learning does not provide opportunity for personal contact or immediate feedback or for participants to learn from the experience of others. And it does not provide for development of union solidarity through personal contact.

Discussion groups/study circles (combining elements of distance learning with short face-to-face activities) may overcome some of these drawbacks if:

- There are well-trained facilitators.
- There are well-planned materials for participants to use to prepare for discussion.

Programmed learning

The emphasis upon active learning to some extent has diverted attention from another strategy that is particularly useful for dealing with technical knowledge issues. The classic in this field is *How to read a balance sheet: An ILO programmed book*. This publication was produced in the Management Development programme within the ILO. The programme is a self-assessing activity that can also be used in face-to-face training. Booklets like this would be very effective distance-learning tools for technical skills required by union officers.

Online learning

A major problem facing all involved in trade union education is access to training courses, to leave and to training materials. The Internet has great potential to increase access as more people have ready access to a PC. It is feasible to develop sophisticated learning packages for use online. These could also allow centralized recording of progress and success. It is possible to present materials in such a manner that progress can only follow if participants complete assessment tasks correctly.

In the short run the focus on online access may be trainers. Rather than aiming to involve masses of rank-and-file workers or even trade union representatives, an initial programme supported by the ILO Bureau for Workers' Activities (ACTRAV) might be targeted to trainers. This may be a method for providing them with the stimulus and support necessary to become involved in actually conducting training.

The focus of this component would be on providing modular training packages so that trainers would not need to design courses but simply to conduct them using pre-prepared materials and session plans. Materials should include:

- Background reading. Rather than developing special materials this may be achieved by linking to other online materials with study guides about the key issues to consider in the reading. There could be some self-assessing activities to ensure learning is effective.
- A timetable for the course or a module.
- Aim and objectives for course, sessions, module.
- An active learning session plan.
- Handouts related to aim and objectives and the session plan.
- Case studies, role plays, field trip instructions.
- Advice on how to brief any guest speakers so that they cover what is required.
- PowerPoint presentations and other useful visual aids (there are a wide range of photos and graphic materials potentially available for improving trade union education but they are not readily accessible through a single database; a project to collect such materials, make them easily found (for example, there are many useful graphics on a CD produced by the ILO which are in loose subdivisions but are simply numbered. Each should be catalogued with a range of keywords to facilitate retrieving these graphics and make them available online).

Over time more materials could be developed in modular form for trade union representatives and rank-and-file members. Further, it would make sense to integrate distance, online and face-to-face learning, so that trade union education might be organized with distance or online learning activities prior to face-to-face learning and even following face-to-face learning.

Over time this material could be translated to any of the range of languages required. Meanwhile, it would usefully provide trainers access to materials and course ideas.

It is worth reviewing, at this point, what ACTRAV is currently doing. It is stepping up its activities, for example, by:

- international campaigns to promote the ratification of ILO Conventions
- organizing meetings and seminars on subjects of interest and topicality to workers
- preparing representations to ILO member States to secure the respect and implementation of their commitments
- project implementation and technical cooperation and assistance in the field
- training of trade union leaders
- conducting specific programmes pertaining to labour issues. This indicates the extent of trade union education.

Some of these activities are more relevant to trade union education than others as the following sections show.

What issues should form the focus of a comprehensive trade union education programme for the ILO?

Given much of the discussion above, it would be useful to focus on:

- The skills required to carry out the whole range of trade union roles, encompassing:
 - Union administration;
 - Recruiting, representing, negotiating and grievance handling;

- Effective social partnering (making representations to governments and others).
- Leadership development for union representatives (it might be appropriate to focus on this more than in the past. There might be useful common skills that underpin the development aspect of training. For example, research, problem solving, strategic analysis, policy development, report writing and making presentations).
- Understanding Conventions and Recommendations, integrating ratification into Framework Agreements and collective agreements. Developing a case for ratification for each Convention. Setting priorities for ratification (for example, some key Conventions that integrate with worker objectives, such as the Workers' Representatives Convention, 1971 (No. 135), the Paid Educational Leave Convention, 1974 (No. 140), the Occupational Safety and Health Convention, 1981 (No. 155), and related Recommendations).
- Understanding how to make a complaint to the ILO (this is a topic that could utilize online learning).
- Integrating issues relevant to women and youth into programmes and developing specialized programmes for them where required.
- Greater emphasis on improving OSH outcomes, including environmental issues.
- Dealing with social justice issues including:
 - HIV/AIDS
 - Ability
 - Skilling the workforce
 - Child labour
 - Rural workers
 - Informal economy
 - Migrant workers.

What structures?

It was suggested above that there is competition for diminishing resources and a tendency to operate in isolation. There is a need for, at the very least, more *coordination* of trade union education programmes so that they work together to achieve trade union objectives and share materials and other resources.

It will be very useful if, prior to the global conference on education, the following targets were achieved:

- Briefly outline what trade union education programmes have been conducted in the past five years with emphasis on their impact on the work of trade unions to improve membership outcomes.
- It would be productive if participants in regional conferences were asked to complete a survey before attending. The survey could seek specific information to demonstrate the effects of earlier training programmes. For example, if there had been a project designed to campaign around ratification of, say, Convention No. 155, the survey would seek information about what was done and whether there was any indication that ratification had, indeed, been made more likely.
- Identify the existing range of potential resources that could be pooled to support an agreed comprehensive, integrated trade union education programme to be taken to constituencies. These resources should include six elements.
 1. Trainers who have been conducting training.
 2. Other trainers who could be encouraged to take part in training.
 3. What training materials and programmes exist that could form the basis for common materials available online?
 4. A team of experienced trainers able to write materials as agreed in formats that can be readily customized for online access.

5. Agree on how a trade union education programme could be coordinated. This might involve setting up a Global Union trade union education committee that worked with the ILO workers' education specialists.
6. The roles of the various parties should be agreed.

This committee (see point 5 above) could operate at a number of levels. At the regional level the ILO workers' education specialist would work with representatives from Global Unions (ICFTU-Asian and Pacific Regional Organization and GUFs). The regional committee would,

among other things, ensure that well-produced training packages were developed and made available of line. At national level there would be committees with representatives from Global Unions whose functions would be to ensure that trade union education courses were conducted and organizations were encouraged to conduct some joint training and to share trainers.

It would be enabling if agreement could be reached, in future, to minimize training of trainers programmes in favour of providing support for trainers and their organizations to conduct trade union education courses.

Trade union education in Europe – Some latest developments

European trade unions are faced with workplace challenges old and new, both in their traditional roles and in their responses to the political and economic outcomes of globalization. Each of these factors shapes the development of trade union education as an essential element in trade union renewal.

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In 2000 the European Trade Union College published the first major comparative survey of trade union education in Europe and concluded that the “diversity uncovered in the research should not be surprising given the different historical traditions of national trade union movements, the range of approaches to workplace employee representation and the disparities in legal frameworks and funding opportunities”.¹ This diversity had led to particular and specific national approaches to the six areas that the survey established as key indicators: access, funding, participation, the role of national confederations, content and pedagogy.

This is not the place to attempt to replicate the earlier work but it is important to reassess the analysis in the light of the accession of the new Member States to the European Union (EU) and the rapidly

growing impact of cross-national employment relations systems exemplified by the emergence of European Works Councils. This context is critical to the understanding of change. This article will examine the key dimensions of those changes and review how they translate into union education programmes at the national and European levels.

Renewing trade unions

Comparative analysis of trade union development is notoriously difficult given the particularities of national cultures and historical traditions. However, many trade unions have been engaged in animated debate about their survival and their renewal.² These debates have often, but not only, been spurred on by declining

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membership. At the workplace, there is a renewed (some would say new) focus on “organizing” that goes beyond simple recruitment. Workplaces have been dramatically affected by changes in organizational and occupational structures. While the focus on change often neglects what remains, it is clear that unions are faced with challenges from new workplaces that derive their existence from the “knowledge economy” and information technologies. Such workplaces are often associated with young workers who may find it difficult to identify with trade unions.

Beyond the workplace the traditional alliances of trade unions with the political parties of social democracy have been weakened or restructured. Hence, supportive labour legislation can no longer be assumed, and the success of right-wing parties in European elections has seen the dismantling of union rights and a reduction in union power and influence. This is, at least in part, related to the challenges of globalization and the ideological dominance of neo-liberalism. It is clear that the steady emergence of the European Union itself as a supranational institution has an important role in shaping employment relations. “New” Member States are starting to be influenced by new systems of social dialogue and information and consultation frameworks. In addition, the dominating role of multinational companies in major economic sectors brings with it a global approach to employment practices and towards dealing with trade unions.

In sum, European trade unions are faced with workplace challenges old and new, both in their traditional roles and in their responses to the political and economic outcomes of globalization. Each of these factors shapes the development of trade union education as an essential element in trade union renewal.

Education for change

It is clear from the responses from national trade union confederations to the recent survey that, while changes in trade union

development have clearly influenced the content of trade union education, there has been some stability in terms of organization and pedagogy. There have been no major changes in the framework of law that now covers trade union education in the “old” 15 Member States of the EU. Nor have there been significant changes in collective agreements covering trade union education, with the interesting, if minor, exception of a new agreement in Greece (2006) which allows for a limited number of private sector workers to take nine months unpaid leave to follow courses at the newly established Greek Trade Union Education Academy. Data from the “new” and “candidate” Member States of the EU show that it is difficult to establish appropriate legislation, but this is not to suggest that a framework of rights does not exist.³

There have been subsequent positive developments. The new Labour Code in Slovakia provides for paid time off for trade union education. There is now a right to participate in programmes with earnings protection in Latvia. The accreditation of courses in Hungary can make funding available. In Bulgaria the right for time off work has been incorporated in sectoral collective agreements in Bulgaria, and WETCO, a trade union education institute, has been recognized as a national agency for vocational training and education.

Pressures for “organizing” are increasingly reflected in the content of trade union education programmes. In the United Kingdom, the Trades Union Congress (TUC) has increased its training for trade union representatives from 32,471 in 2001 to 46,502 in 2005. In addition it has adopted the United States model of an organizing academy which initially began with recruiting and training new union organizers on behalf of its affiliates. In Sweden there has been a shift in emphasis in delivery to reflect the need for membership activity and involvement. The national trade union centre (LO) and affiliated organizations have targeted funding on basic membership training and have had a dramatic increase in involvement, from 11,000 mem-

bers in 2001 to 38,000 in 2005. Numbers in the other Swedish national trade union federation, TCO, have also increased. In Greece, numbers have increased, partly as a result of the increase in courses available regionally and locally. Participation in programmes in the new Member States of the EU remains restricted, but in five of the responses to the survey from Central and Eastern European countries there were indications of trends towards slightly higher numbers. Other organizations, SAK (Finland) and the DGB (Germany) for example, have however seen the number of course participants decline.

Cost-effective delivery has become even more significant since the 2000 survey and there has been the merging or downsizing of education facilities alongside strategies to enter into a commercial market place to fund programme delivery. Cost pressures are likely to continue, as internal union funding declines with membership reductions and public expenditure is squeezed. However, alternative strategies and sources of funding have been pursued with some clear examples of success. In Spain trade union education has been considered over the past three years as appropriate for government funding. In the United Kingdom, the TUC has rapidly expanded its involvement in vocational education, particularly basic numeracy and literacy, through its promotion of union learning representatives. Forrester (2004) records the UK government investment of £34 million in 350 projects and this is continuing to grow. In Finland the Human Polytechnic, a private training institute, is prepared to provide trade union education, in cooperation with the SAK. However, other organizations, for example the DGB in Germany, are facing less benign competition for trade union education provision from private training institutes.

Costs have conditioned delivery modes, as schools have been closed and revenues for residential programmes reduced. Distance and electronic delivery have emerged as potentially both cost-effective and enabling in reaching new and differ-

ent audiences. Change in education programmes reflects changes in trade unions more generally and the significance of the Internet has been widely debated. One reviewer has argued that change has been "sufficiently rapid to suggest that unions are indeed morphing from institutions of the Webbs to institutions of the web".⁴ Such change has the twin impact on trade union education across Europe of providing a need for new skills in using the web and utilizing interactive electronic delivery as a significant mode of delivery. Reaction has been mixed, however. In Germany, distance learning is not well accepted. In Finland and the United Kingdom more distance learning experiments and projects are going on, but the numbers are still modest.

Finally, the national confederations continue to act as catalysts for delivering programmes. This remains the case in general but it is critical to the development of trade union education in new EU Member States where the establishment of a strong and viable confederal centre is essential. In this respect, external support for these countries is important in establishing training where there may be other priorities and a paucity of resources, including skilled trainers. Rapidly changing economic sectors through privatization and overseas direct investment also stimulates an international and comparative dimension to programmes as the lessons of other European trade unions are contextualized within the particular cultures and traditions of these countries. It is to this broader, European dimension in trade union education that this article now turns.

The Europeanization of trade union education

The Europeanization of industrial relations has led to significant changes in the demands placed upon trade union officers and representatives, producing new training needs within trade union organizations. As a result, the European Trade Union Confederation (ETUC) agreed a

training strategy whose overall aim is to develop a European trade union identity, by providing training for the leading actors of the European trade union movement and by adding a European dimension to national trade union education activities.

The ETUC training agency, the European Trade Union College, was established in 1990 and merged in 2005 into a broader organization, the European Trade Union Institute for Research, Education and Health and Safety (ETUI-REHS). In operational terms the Education Department of the ETUI-REHS retains a small secretariat based in Brussels, but, given the cooperative nature of its work and the availability of resources (schools, trainers, experts etc.) within ETUC-affiliated organizations, it has a broader-based European presence.

Training the leading actors of the European trade union movement

The core of ETUI-REHS education work is the provision of “short” transnational courses for European trade union officers and representatives, reflecting key ETUC policy priorities: the latest being, reinforcing Social Dialogue and collective bargaining in Europe; delivering the Lisbon agenda; reinforcing workers’ rights in multinational companies; recruiting and organizing. In addition, ETUI-REHS education has provided a vast range of tailor-made courses in response to the changing needs of ETUC affiliated organizations – notably, language learning courses to improve communications between European trade unionists (English and French); courses to enhance strategic and project management skills. The ETUI-REHS education response to emerging policy priorities, for example, the creation of European Works Councils, has led to the organization of a series of courses for trade union representatives from multinational companies: inter alia, Air France, AKZO Nobel, Cegelec, Freudenberg, Manoir, Lhoist, Pernod Ricard, Vinci.

ETUI-REHS education also offers one particular “long” transnational course, *Training Future Trade Union Leaders*, for young trade union officers soon to be faced with the challenge of European trade union activities. This flagship course, which is in its fifteenth year, aims to provide an understanding of the latest developments affecting European trade unionism and an opportunity for improving certain operational skills. In the first week participants present national experiences of workplace representation and collective bargaining and become more aware of what is happening beyond their own national borders. The second week, held in Brussels, provides an opportunity to visit the institutions of the European Union, the ETUC, the European Industry Federations and also the employers’ organization UNICE, thus ensuring a better understanding of the ways in which EU decisions are taken and of the ways in which trade unions can expect to influence this decision-making process. In the third week participants are encouraged to work on European trade union responses to a variety of different European industrial relations challenges.

A new initiative has been the Top Level Summer School, which is now in its second year. Organized closely in cooperation with the secretariat of the ETUC, this course provides general secretaries and presidents of ETUC-affiliated organizations with an opportunity to examine a series of topical issues in an informal environment: for example in 2005, trade union organization in a changing society; demography; social cohesion and the future of welfare states; and restructuring and delocalization.

In this way thousands of trade unionists at different levels from all over Europe have been able to benefit from a unique European learning experience. They have been able to acquire new elements of information, notably by comparing aspects of different national industrial relation systems and by becoming acquainted with latest developments at the European level or latest policy positions of European

trade union organizations. In some of the courses, or in some parts of these courses, they have been able to develop new skills; the preparation of action plans for future trade union work at the national and/or European levels; the use of electronic communications; the learning of foreign languages. In addition, they have been offered a rare opportunity to share European trade union values and to gain a broader European perspective on trade union issues.

Adding a European dimension to national trade union education

In quantitative terms, most European trade union education takes place at the national, sectoral, regional or local level. In order to strengthen the European dimension of national trade union education, while at the same time reinforcing the quality of these forementioned European activities, ETUI-REHS Education has been involved in three interconnected initiatives: networking of training departments and trainers; production and dissemination of training resources, and provision of an EU information service for education and training projects.

Through a process of networking training departments from affiliated organizations, ETUI-REHS has succeeded in establishing a unique European trade union education community. It is built around an advisory committee, conferences and projects. It provides a channel for the transfer of ETUC political priorities into training activities and an opportunity for advising on ETUC affiliated organizations' own training needs. In this way it has been possible to establish a common cultural framework ensuring minimum standards for training activities and to engage in a Europe-wide networking exercise, which has proved to be an essential prerequisite for other joint activities.

Within this European trade union education community ETUI-REHS education has developed teaching and learning methodologies, which take into account the different cultural backgrounds of Eu-

ropean trade unionists and are therefore suitable to different transnational training environments. These have been constantly reviewed in the light of further experience and have been distilled into different publications: for example, the *Eurotrainer's Manual*, *Language Training for European Trade Unionists: a Guide*, *Dialog-On materials for distance learning and electronic networking*. ETUI-REHS education has also established a series of pedagogical courses (training Eurotrainers I and II) and workshops (using information sources, engaging in distance learning, developing language learning) and thematic workshops (Europe and globalization, sustainable development). These events have developed shared notions of best pedagogical practice and offered opportunities for trainers to update their own knowledge and skills. As a result, ETUI-REHS education has established a network of Eurotrainers, and these Eurotrainers are now better equipped to act as trainers on transnational courses and to offer a European dimension to courses at national level.

ETUI-REHS education has also developed its work on training resources and has produced its own materials in a variety of different languages, for example *European Union and Globalisation*, and *Worker Representation Systems in the European Union and the Accession Countries* (in cooperation with the SDA). The challenge is to ensure that they meet the needs of trainers and learners who are working in different contexts and who are affected by widely varying cultures, levels of experience as well as by different industrial relations. It has become clear that paper-based materials have a limited usefulness, and so ETUI-REHS education has changed its publication policy and moved towards electronic publishing. As a result, a variety of different materials are available in different languages as electronic files for downloading from its web site.

ETUI-REHS education has also established an EU information service that offers information and advice on a range of EU programmes and funding opportunities, the aim of which is to support

European trade union education projects. It provides a number of online facilities; an information library which includes simple introductions to EU programmes and budget lines as well as official documents; and a help desk. It also produced a manual for managing European projects successfully.

Concluding remarks

Trade union education remains under-researched, but the latest survey data provide some significant information, particularly as regards developments in “old” and also “new” EU Member States and the role played by the ETUI-REHS in providing a European dimension to trade union education. In spite of severe cost pressures, there has been a general level of stability which underlines both the significance of education and training as a trade union activity and its resilience in exploring new avenues for resources. Patches of declining participation rates (seemingly an inevitable consequence of declining numbers) have been offset by some examples of growth and expansion in the light of new strategies.

While some stability in legal frameworks and collective agreements supportive of trade union education is notable, it is clear that development is required in two directions. First, there is a need for trade unions in countries developing new legislative frameworks for industrial relations to exert the necessary pressure to ensure that laws include provision for paid time off work for participation in education. Second, as the Europeanization

of industrial relations continues to grow so it needs to be matched by initiatives at the European Union level to ensure that workers' representatives are supported through rights to training. For example, Miller and Stirling⁵ have described the lack of specific training rights in the EU Directive on European Works' Councils as “an opportunity missed” that still remains to be addressed.

However, in the face of an often hostile climate, the challenges of change are being addressed by dynamic trade union education programmes that extend pedagogy and practice into new areas of activity. There are important lessons to be learned in Europe, as trade union organizations seek to develop their skills and knowledge base to ensure they remain influential actors in national and European industrial relations systems.

Notes

¹ Bridgford, J.; Stirling, J. 2000. *Trade Union Education in Europe*. ETUCO, Brussels.

² Forrester, K. 2004. “The quiet revolution? Trade union learning and renewal strategies” in *Work, Employment & Society*, Vol. 18, No. 2, pp. 413–420.

³ For an introduction to trade union education systems in Central and Eastern Europe, see Bridgford J., Kostal, M., Martinek, D. 2000. “Trade Union Education in Central and Eastern Europe: Some Examples” in *Transfer*, Vol. 6, No. 3, pp. 486–497.

⁴ Freeman, R. 2005. “From the Webbs to the web: the contribution of the Internet to reviving union fortunes” in Fernie, S. and Metcalfe, D. (eds) *Trade unions: Resurgence or demise?* (London, Routledge).

⁵ Miller, D.; Stirling, J. 1998. “European Works Council Training: An Opportunity Missed?” in *European Journal of Industrial Relations*, Vol. 4, No. 1, pp. 35–55.

Labour education the Nordic way – The Nordic Folk High School in Geneva

With its more than 75 years of experience, the Nordic Folk High School in Geneva has a strong tradition of labour education. Every year, about 35 trade union members from the Nordic countries take part in a course run alongside the International Labour Conference in Geneva.

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The whole concept of Nordic-style popular education and study circles is based on bringing people from different backgrounds together. They learn together and they learn from each other. Every year, the course run by the Nordic Folk High School in Geneva (NFHS) during the International Labour Conference is different, depending on the agenda of the conference and the interests of the new student intake. And every year the course inspires people to participate in international work, to commit themselves and to contribute to practising democracy and building social capital and active citizenship.

A brief history

Towards the end of the 1920s, public and published opinion in the Nordic countries seems to have been largely ill-informed and negative about international cooperation. Scholars were able to study international issues in Geneva, but the many people without an academic degree or language skills had no such opportunity. However, since 1919 and the establishment of the ILO, the labour organizations and their members had been taking part in international cooperation. The Nordic representatives Ludvig Krabbe (Denmark), Christina L. Lange (Norway) and Sven

Backlund and Sture Thorsson (Sweden) all realized that the support of a knowledgeable and active public opinion in the Nordic countries would be crucial to those efforts. So they contacted the non-formal adult education organizations that were positive towards international co-operation. The idea was to found a Nordic centre for international studies and to offer active members of the Nordic labour movement and the political and cooperative organizations an opportunity for genuine Nordic cooperation within an international environment, despite their lack of language skills.

From the very beginning, the languages used at the school were Danish, Norwegian and Swedish – in practice, generally a mixture of these closely related Nordic languages. And right from the start, the participants attended the International Labour Conference. The school was initially intended as a Nordic initiative with two main purposes – to strengthen Nordic cohesion and “Nordic Added Value” by bringing together young active members of the trade unions and non-formal adult educational organizations for joint study events in an international environment; and to ensure that the students took back their experience and knowledge with them to transfer to their colleagues and friends, so acting as advocates of a broader and more open international orientation.

The aim was to establish a school open to everybody, but the target group was and is primarily young active members of the trade unions, together with the political and cooperative popular movements who are interested in working internationally in and outside the Nordic countries. Knowledge was to be promoted of the international cooperation that came into being after the First World War, and an international atmosphere was to be blended with the Nordic Folk High Schools' strong tradition of bringing young people together to discuss democracy and society.

The annual course offers the students:

- a four-week study session on the ways in which labour movements and other popular movements can influence a globalized world
- an understanding of Nordic cooperation and Nordic Added Value
- a wide knowledge of international cooperation, international institutions, Conventions, legislation, rules and regulations as they relate to the labour market and the ILO's tripartite system
- stimulation and inspiration for labour activities nationally, regionally and internationally
- a growing knowledge of and insight into common values in the Nordic countries
- greater understanding of and for the Nordic languages
- an outstanding opportunity to broaden their minds and qualify for further international work.

In the 1920s and 1930s, the courses lasted for three months. The initial two weeks focused on inter-Nordic communication and understanding and were spent in a Nordic Folk High School. The final part included many study visits. The students travelled widely on their way to Geneva, visiting institutions and organizations.

From the very beginning, the courses had a special flavour, in the sense of mixing the Nordic tradition of residential non-

formal adult education in the folk high schools with a kind of action learning: being and studying where it is at – where the action is.

The founders of the NFHS had a vision for their school. At the beginning, there was no pre-existing experience of the model that was planned for the NFHS. In that sense, the very first course might be described as partly planned and partly improvised. Improvisation has always been a strong element within the school. When working in an international environment, at the Conference and among the different committees and delegates, a constant capacity for compromise is needed. New approaches have to be found and schedules have to be changed.

Delving back into the archives and the many stories told by those who took part, it seems as if the backbone and the core value of these courses over the many years has been the combination of lectures, introductions, dialogue with the many delegates and advisers, and the projects carried out by the students.

Over the years, teaching methods at the courses have changed, evolving from a rather more “chalk and talk” approach into today's balanced mixture of lectures, debate, projects and group processes. This strong and, over the years, varied and carefully balanced mix of learning and education has been going on in an ever-inspiring setting of action learning. You are where it is at, each individual in constant dialogue with the conference and the delegates and counselled by the teachers and inspired by your fellow students and the common discussions.

When the students meet in early April for the four-day preliminary course in a Nordic country, within a folk high school setting, the main aim is to get acquainted with other participants and the languages of the other Nordic countries. The preliminary course is followed by five weeks of group study over the Internet, preparing for and leading up to the journey to Geneva at the end of May.

International topics change just as the international institutions do. Thus, the

European Union has become a recurring theme in the Nordic School, even though Norway, Iceland and Greenland have not joined the EU. Despite this fact, they have adjusted their legislation in line with that of the EU and are substantially cooperating with the Union. So the differences between, and relative significance of, the ILO Conventions and the EU directives are tackled and thoroughly discussed from new angles every year. The participants always seem to engage in emotional and political debates about the necessity of being EU members.

Language and culture are, of course, both classic themes in an international high school environment and provide the means of crossing barriers and building friendship and solidarity. Even though the themes seem to change over the years, in fact they are durable, coming back over and over again in different disguises. For example, the abolition of child labour has been on the ILO's agenda from the very beginning. The school's themes and the project working groups follow the agenda of the ILO Conference.

Many of the students have stated that their lives are different after the course. The overwhelming impressions, the new friends, understanding, horizons and perspectives, and the networks and changes seem to carry on generating warmth and inspiration over many years. While attending the Nordic Folk High School, there is no doubt that the individual receives extensive and challenging inspiration.

One challenge for the organizations involved – the stakeholders – is to make the best of the people they send, so that both the organizations and the individuals derive maximal benefit. Another aim, for the national labour movement and all the other stakeholders in the NFHS, could be to achieve greater effectiveness in taking up and meeting the challenges brought back each year by committed students. For example, the students could be given more opportunities to write articles, give presentations and organize networks and projects within the Nordic cooperation programmes after they return.

The NFHS has always worked for Nordic cohesion, and Nordic-style cooperation has for many become a symbol of the Nordic added value within international cooperation, always putting peace, understanding and international and active citizenship on the agenda.

When asked, participants evaluate the school very positively. In that sense, the school is an outstanding success. Despite the participants' differing individual aims within the course, and their different backgrounds, qualifications, age and experiences, and despite a series of practical, economic problems in financing the school and the challenges posed by language differences, they rate it as a unique experience that they certainly would not want to have missed.

That experience has, for many of the participants, mainly been in terms of the personal development stimulated by the process and by encountering other Nordic participants and the international environments and organizations.

Some participants have built international networks and developed their international skills, moving on to more formal competences and careers in international work within the labour movement. In general, the participants acquire greater international understanding and awareness and more knowledge about the activities of the ILO and other international organizations.

The school is at its best when it is a melting pot for ideas and projects, giving perspectives on both Nordic non-formal adult education and the global labour movement, and providing inspiration that stretches beyond its limited course of four weeks plus the Internet course. Seen over the years, there have been dramatic changes. Compared with the beginning and the proud traditions of non-formal adult education and study circles, the tools have changed but the challenges and the problems remain. So, despite the impression of being perhaps even better prepared for the course than one might have been some 50 years ago, it is still a remarkable change to be in Geneva at the ILO for the

first time. Watching, listening, interviewing and discussing are core disciplines once the students are there. This is certainly not a joyride. It is hard work for students. The stakeholders should take more interest in the education and the methods used in order to improve opportunities for workers. Perhaps other countries and regions could be inspired to do the same. One could imagine initiating courses like those of the NFHS for other regions or countries in order to strengthen and inspire workers' education in general.

Building knowledge, confidence and social capital is a prerequisite for tackling such global challenges as sustainable development, building sustainable democracies and welfare societies, fighting poverty and hunger and abolishing child labour and trafficking. We are all facing these challenges, and we will continue to do so in the years to come. The Nordic Folk High School and its tradition are a small but essential contribution to building the understanding, knowledge and social capital required.

Moreover, it is important that the NFHS should set a clear agenda in view of the Nordic commitment to the ILO and the tripartite system at the international level. No other school or course is doing the same. The significance of this has by

no means diminished in the globalized world of today. And the ILO also needs the NFHS. Each year, its students witness the considerable work performed by the ILO, and the need for it as a global meeting arena and an enabling institution.

Celebrating more than 75 years of the Nordic Folk High School of Geneva means not just looking back but also continuously renewing, improving and elaborating the teaching methods used in the NFHS and workers' education. The school should be regarded as a study circle and a Nordic think tank on workers' education. It should be constantly creative and should challenge organizations and individuals by raising and tackling the sensitive, difficult consequences of a globalized labour market and living conditions.

The NFHS must strike a delicate balance between meeting future demands from organizations and participants and staying on track as an international folk high school. So we constantly have to engage in self-questioning. We can hone our methods by asking ourselves whether we are doing things in the best possible way. We should also seek new ways of improving cooperation between the Nordic Folk High School and the ILO and the many organizations working around the annual conference. These are today's challenges.

Trade union training and labour education in Latin America – Progress and challenges

In Latin America, diversity is as broad and changing as it is complex. So any pronouncements on diversity have to take account of the realities in each nation, sector and population group concerned. Significant influences include income levels, gender differences and the level of socio-political organization and participation. Hence this overview of progress and challenges in education is based on broad, observable trends and not on the specifics of each country.

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“In confronting the many challenges that the future holds in store, humankind sees in education an indispensable asset in its attempt to attain the ideals of peace, freedom and social justice.”

JACQUES DELORS ¹

A significant advance at the regional level is the progressive social consensus that education is a human right and is therefore lifelong. This political consensus has not yet led to a change in the education system – in other words, to an appropriate linkage between the various components of its structures or to the social, solidarity-based responsibility that its financing would entail. The big challenge is to make this right a reality for everyone.

The trade union movement is one of the actors that have done most to stimulate and promote educational development. This led, from the beginning of the last century onwards, to the successful inclusion of education in the range of constitutional rights, with the recognition that education should be compulsory, public and free of

charge. In some countries, the principle was also established that education should be non-denominational. In other cases, it proved possible to lay down educational responsibilities for enterprises, as in Article 123 (paragraph “A”, point XII) of the Mexican constitution. The right to vocational training and work was also asserted. Other historic contributions included trade union participation in national literacy campaigns. For instance, Brazil's CUT labour confederation (Central Única dos Trabalhadores) developed a Youth And Adult Literacy Project called “All The Letters”. In 2005, 80,000 workers benefited from this project, and most of them came from the most vulnerable groups. Another recognized experience is that of the Adult Secondary-Level Education Centres run by

the CGT (Confederación General del Trabajo) in Argentina. These have a long and important history behind them. Some regional trade organizations such as ICFTU-ORIT² and the IUF³ conducted literacy programmes in Haiti a few years ago.

The recognition of education as a life-long human right has multiple implications. The renewed value placed on participation and the involvement of all the social actors in education is seen in the growing trade union participation in defining education policies and programmes for all.⁴ This despite the fact that the State's responsibility to guarantee education for all remains intact. Another implication which should be discussed is the trade union role in continuous training for workers, with all that this can entail both politically and financially for the State. There are notable examples of how trade union education can be financed without the organizations' losing their independence and autonomy. One of the most highly developed schemes is in Spain, but there are also experiences in the Latin American region. Those of Brazil, Chile, Panama and Mexico may be cited. Each has specific characteristics.

By contrasting the right to education with the population's actual access to it, insights may be gained into the deficits and the levels of inclusion and exclusion. In the process, it becomes clear that new indicators will have to be developed and that some of the traditional indicators will need to be redefined.

In the past, education was seen as a path to social betterment and this remained so for many years. However, due to the changes wrought by the third scientific and technological revolution, the implementation of neo-liberal policies, the opening-up process and free trade, education is no longer a guarantee of social betterment, although it remains indispensable for the achievement of more and better options for living and working.

Today, hundreds of thousands of professionals have sought refuge in the informal economy, while others are part of the great migration flows across the globe in

search of better working and living conditions for themselves and their families. Others still are overqualified for the jobs that they are paid to do. These phenomena represent a stumbling block for social and human development.

Some of the most significant advances at the regional level in the field of education are:

- Better basic education coverage. It will be possible to achieve the millennium goal in various countries of the region.
- Improvements in the quality of education. However, there are deficits in coverage.
- Reduction of the training gap between women and men. The gender parity index is in inverse proportion to age. For instance, there is greater equality of opportunity for the 15–24 age group than at age 25–59.
- Changes in the population structure are tending to reduce the quantitative pressures on education, but the qualitative pressures will grow stronger and stronger, given the advances in scientific and technological knowledge.
- The educational community now shows greater participation than in the past, and the institutional conditions exist for this trend to be consolidated.

Many educational challenges remain, among which are:

- Overcoming the inequality in access to education between the urban and rural populations.
- Equalizing access opportunities and educational development.
- Inclusion of indigenous and black people.
- Improving access to vocational training programmes, which most informal sector and rural workers currently lack.
- Increasing public funding of education. This is mainly spent on teaching staff's salaries. Minimal funding

is earmarked for the infrastructure needed and for research and development of teaching methods. In some cases, greater social contributions are demanded from those who have least.

- Strong promotion of research and development of teaching methods. Many of the current efforts, including the allocation of resources, are not producing results, due to a lack of innovation and reorganization within the educational process.
- Respecting the trade union rights and labour rights of education workers and promoting effective labour dialogue so as to reduce labour disputes and improve working conditions and the working environment.
- Consolidating trade union and citizen participation in the education system.

Free trade treaties can, in some cases, put education at risk, if it comes to be regarded as a merchandise or a business. This outlook tends to perpetuate inequality and excludes millions of human beings from the treasure-house that education can be, in so far as it values liberty and promotes a society based on the principles of democracy, solidarity, tolerance and peace. On the other hand, different kinds of commitment are emerging, such as the one made within UNESCO and the United Nations both to achieve the millennium goals and to make education a universal, lifelong right, so as to achieve compatibility between the greater interdependence of countries and the fulfilment in practice of the human right to education. This is a great challenge which must be resolved.

International cooperation has come to play a vital role in the development of education. In this respect, mention should be made of UNESCO, the Organización de Estados Iberoamericanos para la Educación, la Ciencia y la Cultura (OIE – Organization of Ibero-American States for Education, Science and Culture), the Center of Regional Cooperation for Adult Education in Latin America and the Caribbean (CREFAL) which is also an instance of inter-agency

cooperation, and the ILO itself, which through its technical cooperation and assistance has made education one of its main pillars and is the only body that has, from the outset, conducted tripartite training activities for the world of work.⁵

As education is a lifelong process, trade union training builds on the previous learning experiences of the workers who are members or fraternal supporters of the organization, and the same goes for other processes of vocational training, citizenship training etc. So it is appropriate to outline the advances and challenges affecting education in general before presenting those relating to trade union training.

Trade union training in Latin America

The training given by social movements in Latin America has for the most part been preceded by the work carried out with the grassroots communities through popular education. The application of Paulo Freire's method, as set out in his book *La Pedagogía del Oprimido*,⁶ echoes the social movement's own views by affirming that nobody is more cultured than anyone else and that there are parallel, complementary cultures. A scholar does not know what a cook knows. Neither does a university professor know what a mechanic knows. The idea is to value these forms of knowledge by building on the social practice and experience of each person, then systematizing concepts that make it possible to interpret one's own reality, reconstruct one's own identity and history and affirm oneself firstly as a person and then as a social actor, thus applying the basic inductive method: *praxis-concept-praxis*.

Starting from these principles, and in the search for spaces through which the trade union movement seeks to construct and reinforce its own collective identity, trade union training develops as a specific, non-transferable function of the labour movement and as a pillar of its affirmation as a historical subject and a socio-political actor. This subject must be able to make its presence felt in the construction of

democratic processes for the emancipation and transformation of men and women who are capable of influencing society by placing people and work above capital. Thus, it is asserted that trade union training is political and strategic in nature, in order to strengthen the organization and its transforming action.

The ability to generate alternative, creative, committed thought also depends on the depth and systematization of trade union training, which should develop workers' critical and political judgement as a product of collective reflection and confrontation.

Obviously, the principles and values that inspire and shape the processes of trade union training are very important in producing a militant, free and autonomous trade union leadership. So, too, are democracy, social justice, equality, equity, worker empowerment, pluralism and effective international solidarity. Below, some of these elements are examined, as they are also among the main challenges.

Trade union training and democracy

In Latin America, democracy has tended to lack substance. This has to do with our history which, in some cases, has simply repeated authoritarian practices dating back to the colonial era. Often, people do not think of themselves as citizens but rather as subjects. This is reflected in labour relations and society in general. One of the biggest challenges for trade union training is to prevent the reproduction of authoritarianism and egocentricity in those who exercise trade union leadership. To achieve this, it is vital that workers should analyse their own history, identify their advances and setbacks and constantly reflect on their own behaviour, so as to rebuild and reinforce their collective identity as a free and democratic movement. Room has to be provided for the expression of disagreement, thus avoiding situations of power abuse. This all has to do with educating people to exercise power, and with a genuine empowerment that is

capable of driving real, effective participation processes. Representative democracy is not enough on its own. It also has to be participative. Continuous assessment of trade union practices, together with self-critical review, is fundamental here.

This means that the independent representation of the workers will depend to a large extent on trade union training, if a situation is to be avoided in which the trade union movement becomes an instrument of political parties or other power centres.

Gender mainstreaming

The concept of gender has helped to demythologize the social relations which, historically, have legitimized the differentiated treatment of people.

In the context of trade unionism, women's role within its structures originates in the exercise of power in a patriarchal society, as women joining the unions adopt behaviour that is alien to the identity that they have formed in private life. In predominantly male working environments, the traditional feminine identity adjusts and, in some cases, becomes similar to that of men, in order to take part in the power structure. For the trade union movement, taking up the struggle for equality means retrieving the genuinely emancipatory content of its role in society and making an effort to combat the male-centred vision of work, which equates the concept of work with that of employment,⁷ and which systematically makes unpaid domestic work invisible, so underrating its economic and social contribution.

Trade union training must incorporate working methods and teaching strategies which facilitate this type of reflection, through the reconstruction of masculine and feminine identities in Latin American society, building strongly on feelings of solidarity and social justice in order to transform the work culture and power relations. Without a training strategy that mainstreams gender into all subjects, we will end up reproducing gender-blind-

ness, intolerance and inequality in society. If the trade union movement cannot overcome the inequalities between men and women workers within its own organization, it runs the risk of losing its role in society.

Trade union training should monitor the process, in order to prevent a repetition within trade union organizations of the typical division of labour between men and women. For women, trade unionism must not be an extension of domestic work or a reproduction of their discriminatory, subordinate relationships within the family. An obvious indicator, and one that should give us pause for thought, is the small number of women trade unionists in the power structures at the various levels.

Equality of opportunity and the concept of discrimination

Social relations are much more diversified and it may be said that no one model, either male or female, exists. This is particularly the case in the industrial urban environments of the metropolises, where cultural diversity is much more visible and people do not always behave in the same way.⁸ Analysis of equality of opportunity requires the appraisal of other relevant differences, such as those of race, social class, ethnicity, religion, etc. The ILO's Discrimination (Employment and Occupation) Convention, 1958 (No. 111) defines discrimination as any distinction, exclusion or preference made on the basis of race, colour, sex, religion, political opinion, national extraction or social origin.

Frequently, depending on the social relations established in the interplay of interests between the social actors, these differences can turn into inequalities which, in some cases, may take on greater importance than the gender difference. In other cases, the combination of different discrimination factors makes the problem more complex to tackle. To continue on this point, the incorporation of migrants into the trade union movement in

a cosmopolitan society poses other challenges for trade union training, with the aim of making its strategies much more inclusive and welcoming of differences that transcend those of gender. There is a need to counter the xenophobic attitudes sometimes expressed in trade union discourse, due to fear of the unknown and the falsehoods that breed in the collective imagination, exploiting the vulnerability of these people. The trade union movement must prevent and combat such attitudes through trade union training.

In any case, the management of these training processes demands a great deal of care and continuous collective review in order to ensure that positive discrimination, and the affirmative measures to which it has recourse in many cases, does not become another source of inequality or of influence-peddling. The aim of promoting equality through trade union training should be achieved in a fair way.

The methodology used in trade union training must promote a choice of content that gets the participants actively involved and, in line with the trade union context, it must promote training action that has the aim of reconstructing the dynamics of everyday social, cultural and political life. These methods foster the reconstruction of identities distorted by the predominating models, which are based on exclusion and are contrary to the trade union movement's own principles.⁹

Ethics and pluralism

The trade union movement needs upright people with strong critical faculties. Only then will practice have a liberating content. Trade union training must generate an attitude of ethical commitment, given the demanding task of achieving the common good. This also implies promoting political awareness among workers, so that they are in a position to judge and question historical contexts and shackling structures.¹⁰

Trade union training should foster an ethical environment for trade union commitment and action, in which transparency,

checks and assessment make it possible to conduct trade union management in a democratic, participative way. Thus, it should foster the process of unity within the working class, while developing a strategy of alliances with other social and popular organizations. For this, it will be necessary to generate a process of dialogue within a framework of ideological pluralism, in order to make consensus possible on problems which the great majority of people have in common.

ICFTU-ORIT, CLAT and the Global Union Federations (GUFs) in Latin America

ICFTU-ORIT regards education as a training process of a socio-political nature. Thus, it makes the strategic link between trade union, vocational and formal training at the national, subregional and continental levels, the watchword being "education for all, throughout their lives". Attention is therefore focused on workers and their families, from an integral perspective.

This approach tends to prevail within its affiliated trade union organizations. Something similar happens in the case of WCL-CLAT and of the Global Union Federations. In this way, efforts are made to shape a proposed education model which links the building of knowledge to the world of work and civil rights.

Trade union organizations committed to educational development make visible those economic forces that are tending to position education as a merchandise and not as a human right. Unions demand that the State should fulfil its inescapable role as the guarantor of compulsory, public, free, non-denominational, high-quality, lifelong education, together with the necessary social participation in the framing of education policy.

Within the trade union sphere, cooperation and international trade union solidarity were fundamental rights from the beginning of the trade union movement, as they contributed and continue to contribute to all fields of trade union and

socio-political endeavour. For instance, we have programmes that promote the acquisition and respect of trade union, labour and social security rights; training of trainers; the creation and operation of training schools and centres; safety and health; housing; trade union media and communications; cooperative development and other forms of social organization of work; and finally, participation in and construction of the social dimension of globalization, which is ultimately part of promoting decent work.¹¹

It is important to note that, although this cooperation and solidarity operate mainly between North and South, other initiatives have developed on a South-South basis. While the national level has received most attention, a very important role is also played by support for the training of union officers at levels ranging from the bi-national to the intercontinental.

Labour education is one of the fields in which the trade union principle of internationalism is constantly and systematically expressed. The solidarity of the Belgian, Dutch, French, German, Italian, Nordic and Spanish trade union movements is especially recognized, as is that of the Canadian and US unions.

Cooperation on trade union development happens multilaterally through the big global centres and their regional bodies, but also through bilateral work and, more recently, through the support of fraternal non-governmental organizations.

Other significant successes have been achieved through government-backed development cooperation funds, by channelling support to strengthen trade union organizations, and by building up their capacity for dialogue on labour relations. This success has been achieved by the trade union centres of the European countries, but also of Canada and the United States. Some of these centres have created entities with strong organic links to them, but which are independent from a legal point of view, so that they can channel trade union development cooperation.

Trade union organizations have played a vital role in channelling funds for labour

education through the ILO and, in this way, education programmes to strengthen trade unions have been developed, among other things.¹²

While the funds contributed through cooperation and solidarity have been important, we should not forget the great historical contribution made by the exchange of experience and technical and policy support, which has been of significance for the trade union movement as a whole. All this has resulted in greater international unionization, cohesion, linkage, relevance and joint struggle.

As mentioned, internationalism is a historic principle of trade unionism and today the practice has been renewed and is constantly developing, enabling links to be made between global and local issues, given the internationalization of production processes and the growing independence of countries.

Advances and challenges

What advances has trade union training made in Latin America, and what are the challenges? Full answers to those two questions would require analysis of the situation at levels ranging from the local to the regional. Space does not permit that depth of treatment here, but the following section points to some phenomena that can stimulate reflection on this issue.

First, we need to know what priorities education sets itself as a part of internal and external trade union life. The answer to that question should lead to two planes of reflection – one is political and ideological, the other objective and operational.

The first plane goes back to the question that ICFTU-ORIT asked itself: What is the challenge currently facing trade union training in terms of strengthening organizations and their transformational action vis-à-vis the hegemony of dominant neo-liberal, globalizing thinking? Its answer to this question was that the strategy for taking issue with hegemony will be reached via the construction and socialization of socio-political thinking. In

this process, trade union training plays a strategic role in orienting the action for mobilization and social transformation taken by the trade union movement and its organizations. Added to this, there is the importance of broadening the coverage of the trade union training processes. Thus, it is clear that education occupies a prominent place in the organization's policy and practice.

This same question might well be asked within every organization, and it brings us closer to knowing the hierarchical level occupied by trade union training within trade union policy. On the operational plane, we may select several indicators. They could be: structure, functions and financing.

Trade union organizations include an educational structure within their statutes. The most common structures are a secretary, a department answering to a secretary or an elected representative to whom the educational function is assigned. The first of these would indicate a higher hierarchical position and priority. In a number of countries, the trade union organization have a very substantial educational infrastructure, with institutes, schools, and centres for technical and higher education.¹³ Among these, we may highlight the cases of Argentina, Brazil and Mexico. Likewise, union organizations in various countries have established links with academic and research institutions, in order to target their educational action and to have an impact on the universities' extramural programmes.

Of the regional trade union organizations, CLAT has an extensive network of institutions, including the Workers' University of Latin America (UTAL), the Instituto Internacional de Estudios y Capacitación Social del Sur (INCASUR), the Instituto Andino de Estudios Sociales (INANDES), the Instituto Centroamericano de Estudios Sociales (ICAES), the Instituto de Formación Social del Caribe (INFOSCAR), and the Centro Nacional de Promoción Social (CEMPROS), as well as the Instituto Latinoamericano de Cooperación y Desarrollo (ILACDE).

ICFTU-ORIT has developed a school for socio-political thinking and has formed a continent-wide collective made up of members of the education teams from affiliated national centres and fraternal organizations.

At the national level, the general challenges that we observe relate to the hierarchical and functional level. In the first case, it would be appropriate to give educational work the rank of a secretaryship, as this would ensure that, on the one hand, discussion, participation and coordination with the other trade union authorities would be at the higher executive level and, on the other hand, education would be well placed for reporting and making proposals to national trade union congresses.

As regards functioning, it may be observed that for a large number of national trade union centres, links to the affiliated organizations are precarious and it would therefore be appropriate to set up a coordinating mechanism, within which it would, for example, be possible to make recommendations on national education policy, strategies and programming. This mechanism would also be an excellent means of socializing successful sectoral and local experiences. In some countries, such mechanisms have been established through national conferences, consultative councils or other bodies.

At the regional level, the challenge seems to be to find the most appropriate way of benefiting from the existing infrastructures and from the development of the schools for trade union thinking that have been generated in the region. This could improve two relevant factors, namely the level of impact or effectiveness and economic feasibility. This challenge could be resolved when the new regional trade union organization is formed, following the trade union unity achieved by the ICFTU and the WCL in November 2006.

The financing of education

Trade union organizations that are totally or partly self-financing are an exception.

Most of these organizations are in a situation of financial dependency – essentially, they are dependent on cooperation and international solidarity, either directly or through the support received from NGOs. So a clear challenge is to become self-financing.

Over time, the organizations have sought out various options for achieving a higher financing level for education. The most striking are those in which funds for worker education are granted by law. This is the situation in Brazil and Panama, for example. In other countries, it has been possible to build in budget lines for worker education, which are passed on to the unions. Among such cases, we may cite those of Chile and Mexico. In other cases, some collective bargaining gains are achieved which can be used to support the financing of education.

While the rhetoric may identify education as a priority, this does not sit easily with the lack of earmarked funding and the lack of permanent, systematic action to provide education with the resources needed for its development.

Another factor linked to educational financing is the cost, in both time and expense, to people who take part in training activities. In this regard, it is important to recall that the ILO adopted the Paid Educational Leave Convention, 1974 (No. 140), and the accompanying Recommendation No. 148¹⁴ but only eight countries in the Americas have ratified the Convention. An important challenge is to promote its ratification by the other countries and achieve a higher level of implementation.

One last financial consideration which should be discussed is the recognition of trade union education as an integral part of lifelong learning. Apart from its political implications, such recognition could pave the way for the State to establish some type of support mechanism for the financing of this fundamental education for social development and democracy.

“The pedagogy of the oppressed is ceasing to be of the oppressed and is becoming the pedagogy of people in permanent liberation.”¹⁵

Notes

¹ Chairman of the International Commission on Education for the 21st Century, UNESCO report, *Learning: The Treasure Within*, 1996.

² The Inter-American Organization of Workers (ORIT) of the International Confederation of Free Trade Unions (ICFTU). ORIT and the Central latinoamericana de Trabajadores (CLAT), a wing of the World Confederation of Labour (WCL), launched a unity process at the regional level following the unification at the world level of the ICFTU and the WCL, which formed the International Trade Union Confederation (ITUC) in November 2006.

³ International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations.

⁴ UNESCO. *Educación para todos en América Latina un objetivo a nuestro alcance*, Santiago de Chile, 2004. In particular, see Chart 9 on civil society participation in the various stages of the EPT Plan, p. 74.

⁵ ILO (International Labour Organization): <http://www.ilo.org>.

International Training Centre in Turin: <http://www.itcilo.org>.

CINTERFOR (Inter-American Research and Documentation Centre on Vocational Training): <http://www.cinterfor.org.uy>.

⁶ Freire, P. 1970. *Pedagogía del Oprimido* (Buenos Aires, Siglo Veintiuno Editors).

⁷ Duran, M.A.; Serra, I.; Torada, Y.R. 2001. *Mujer y Trabajo, Problemática Actual* (Valencia, Germania Serveis Grafics, s.l.).

⁸ UNDP. *Human Development Report 2004: Cultural Liberty in Today's Diverse World*, <http://hdr.undp.org/reports/global/2004>.

⁹ Fundo para Igualdade de Gênero (FIG – Gender Equality Fund) of the Canadian International Development Agency (CIDA), *Sistematizando Caminhos, Transposição de Obstáculos e Ocupação de Espaços no Mundo do Trabalho*, Brazil–Canada. 2003.

¹⁰ Betto, F. 1973. *La Mosca Azul: Reflexión Sobre el Poder* (Lima, Editora Rocco).

¹¹ Abramo, L. *Trabajo Decente y Equidad de Género en América Latina*. Santiago de Chile, ILO. First edition 2006.

¹² ILO (International Labour Organization), Bureau for Workers' Activities (ACTRAV): <http://www.ilo.org/actrav>, ACTRAV programme at the International Training Centre in Turin: <http://www.itcilo.org/actrav/english/index.php>.

¹³ This situation is deeply rooted in the history of the trade union movement. For example, the Labour University of Mexico (Universidad Obrera de México) was established on 8 February 1936, three years after the Argentinean CGT set up the Argentinean Labour University (Universidad Obrera Argentina).

¹⁴ ILOLEX. Database of international labour standards. <http://www.ilo.org/ilolex/english/index.htm>.

¹⁵ Freire, P. 1970, op. cit.

