

DEMOCRATISING THE GLOBAL ECONOMY

A Trade Union Vision

A guide for facilitators running a course for trade union leaders

Preface

This educational resource is intended as a tool for public sector trade unions to use in their work of democratising their societies and in changing the direction of governments' national and global policies which have harmed so many workers and weakened their trade unions.

It was clear already by 1993 that there was deep concern, even among relatively conservative governments, about the standard social and economic policy formula which had been 'agreed' among governments in the industrialised countries and foisted onto governments in the developing world. It was a formula that had been pursued vigorously by some governments which still had major problems in attracting and retaining investment in productive capacity and in dealing with the 'problem' of unemployment. I use the word 'problem' in a qualified way. Some of these governments were still attracted to the notion that unemployment was not so much an unacceptable social phenomenon as a useful tool. With it, they could discipline the workforce into accepting wages and conditions which were in line with the 'realities' of the free market.

This concern at a government level, explored in the PSI publication A Public Sector Alternative Strategy: the PSI Vision, was that unemployment was continuing to rise. It was not performing its much vaunted role of acting as a mechanism to reduce wages to the labour market clearing price. Lowered wages were supposed to put everyone back to work at 'realistic' labour prices. They didn't. For the first time in 15 years, politicians such as Jacques Delors, who had strongly insisted that 'there is no alternative', began to ask whether, indeed, there might be some. The PSI paper argues very strongly that there certainly is an alternative, one which can re-invent growth, productivity and social cohesion.

It is easy to be cynical and to opt for point-scoring in debates about labour market policy and economic policy. As is also explored in the PSI paper, these are self-defeating exercises. In many countries in the late 20th century, it was necessary to address real problems in macro-economic and micro-economic policies. The legitimate criticism from trade unions has been that the need for change in social and economic policies is not the debatable issue but the direction and manner of that change. Much of what has been done in search of a 'cure' for economic ills was probably necessary. However, what is contentious is the way in which the cure has been foisted onto a patient who should have been part of the solution in dealing with a life-style problem. Is there another way of dealing with the problem? Can it be done in a different way, with different instruments, aiming at some other outcome?

The affiliates of Public Services International (PSI) believed that the answer to those questions was: Yes. At the PSI World Congress held in Helsinki in 1993, PSI affiliates unanimously passed a resolution calling on PSI to produce an alternative economic strategy which could address some of the questions raised above. The PSI Executive Committee gave this job to the PSI Public Sector Working Group. I want to thank its members for producing the strategy paper, which was endorsed as a PSI policy paper at the Executive Committee meeting in April 1995.

The Public Sector Working Group very quickly and correctly decided that to concentrate only on economic policy issues would be insufficient. PSI and its affiliates have a great deal more to say on the issues surrounding such economic policy than would be addressed in any narrow approach to these matters. They therefore approached the task from the general perspective of what PSI might have to say about a wider range of issues. These included the role of the state in society, public sector reform, social policy concerns, trade union and worker's rights and the organisation of work - as well as economic issues.



The result is a paper which trade unions can and should use for a number of different purposes. Some PSI affiliates and other bodies will be able to use this material as it exists. Others will find that it needs some 'translation' into everyday language or into campaign and educational work done by trade unions. For these reasons, PSI is producing some more 'popular' versions of the paper. One of these is this publication, written for PSI by Anne MacKnight from Canada. She has produced a user-friendly educational resource in a format which will allow trade unions to use the strategy paper for both educational and organising purposes with their members.

One reason for releasing all of this material at this time is that PSI believes that its contents are an essential part of trade union and NGO follow-up to the UN Summit for Social Development held in Copenhagen in March 1995. The concluding section of the paper is entitled Onwards from the UN Summit for Social Development. I would urge readers to consider active ways of putting the messages in that conclusion to work. The Social Summit Declaration and Programme of Action contain much which trade unions and NGOs can use to advance the interests of women, workers, migrants, the developing world, the excluded, those in the informal sector. None of those advances will happen unless politicians can be convinced that the alternatives described in this paper and similar principles agreed in Copenhagen have to be their first priority for the rest of this century and beyond. Both those politicians and we trade unionists will achieve progress only in so far as we think globally but act locally.

Hans Engelberts PSI General Secretary

OVERVIEW FOR FACILITATORS

This 2-day course is a companion piece to the PSI document, "A Public Sector Alternative Strategy". Facilitators will need to be thoroughly familiar with the content and analysis of the document.

LEARNING GROUP

"Democratising the global economy" has been developed for delivery to trade union leaders who have at least a basic knowledge of economic concepts and theories, standard economic measures, and economic institutions (both national and international). It would be good if at least some of the suggested reading list has been made available to group members before the course, as well as any additional material from their own country/region. They should certainly have read the PSI Alternative Strategy paper on which these modules are based. The leaders should be well informed on the economic issues facing their own countries and how these relate to economic issues on the global scale. They should recognise that the world is at a critical stage of economic development and that they have a major role to play in ensuring democratic control over economic decisions, policies and institutions. Ideally, the whole group should have at least 12 members and no more than 25-30.

COURSE OBJECTIVES

The overall objectives of the course are as follows:

- to help trade union leaders develop a critical analysis of the neo-liberal economic agenda,
- to frame a viable alternative strategy for the economy around which to mobilise political support at all levels (membership; public; politicians), and
- to identify measures that can be taken to build global solidarity and international co-operation in pursuit of the alternative strategy.

COURSE STRUCTURE

The course consists of four modules each of which will take approximately three hours of class time to complete:

Module I: Challenging the neo-liberal agenda Module II: Asserting an alternative strategy

Module III: Redesigning the role of the public sector

Module IV: Building global solidarity

The structure of the modules is fairly straightforward and reflects the fact that the key to effective facilitation is a clear understanding of the objectives. These are defined at the beginning of each module and relate directly to the overall objectives of the course. Each

module is then divided into sub-sections that develop the content according to the methodology of adult/popular education - i.e., participants receive and share **information** to increase their **knowledge**; they **analyse** the information to develop **understanding** of the social, political, and economic conditions of their lives; and, based on this new understanding, they determine the **collective action** they need to take to **change** those conditions to better meet their needs as workers and citizens.

Each sub-section in a module describes a "suggested" technique (e.g., small group discussion, case study, role play, etc.) to engage participants in a learning activity related to the objectives of the module. Certain activities may include separate instruction sheets and resource handouts for the participants. If, as the facilitator, you wish to use different exercises to reach the same objectives, then that flexibility is available to you. REMEMBER - it is the principles of group participation and the objectives of the module to which you must be faithful, not the script.

Finally, guidelines for facilitators on anticipated responses and points to be covered within a section are included in the notes. This guidance may be a reference to a specific section of the "Alternative Strategy" document.

More detailed explanations on how to plan and conduct an educational activity using the approach of group participation and active learning can be taken from the PSI *Education Handbook* which is a useful guide on the role and philosophy of trade union and adult education, as well as giving advice on preparing educational material and on the evaluation of an educational programme. It is available from PSI in English, French, Russian and Spanish. PSI is developing educational guides on how to frame educational activities in a campaign-based approach to help with effective trade union organising. This should be available in early 1996.

USING THE FACILITATORS' NOTES

Facilitators' notes are a guide to content and process. They are not designed to be "taught" strictly by the script. Rather, notes are meant to be "flexible" tools - ones that can be altered or adapted as group needs evolve. Also, because notes reflect the particular "style" of the person who developed them, it is important that facilitators prepare their own notes for actual use in the classroom. You will be more natural with the group if working from notes that reflect your own speaking style, thought processes, and logic patterns - i.e., the way you think, talk, and ask questions. Internalising the material in this manner liberates you to be a facilitator. Instead of being concerned about what the notes say should happen next, you will be ready to take your cues from the group.

Individual preparation by the course facilitator(s) will also be necessary to adapt the course to the specific circumstances of the group of participants and the learning situation (e.g., knowledge and experience levels, size of group, cultural similarity or diversity).

At the beginning of your preparations it is useful to carefully study the facilitators' notes, participant handouts (which you and/or the union should prepare in advance), and background reading material as a total package. This will provide you with a comprehensive base of knowledge about the subject, as well as an integrated perspective on the course and an understanding of how the modules inter-relate. Having a clear overview helps you determine the appropriate links to make between and within sessions. It also helps you make on-the-spot content and method choices should time problems develop. These insession changes are easier to make when you have a good idea of where you want the group to be at the end of the course and how the set of notes can help you get there.

BACKGROUND READING MATERIAL

As mentioned, the document, "A Public Sector Alternative Strategy", is central to the course. Participants should be encouraged to carefully read through the document before coming to the course. Additional readings that will be recommended to participants include:

- Ekei U. Etim, Structural Adjustment Programmes (SAPs): the effects on Labour and the public sector in Africa, available from PSI in English and French;
- International Labour Organisation (ILO), World Employment 1995;
- Michael Johnson, Structural Adjustment, Growth and Development: an Overview of the Issues, a paper produced by the Public Sector research Centre, the University of New South Wales, Sydney, Australia - English only;
- Keele University's Department of Human Resource Management and Industrial Relations in the UK uses two papers (*Business without borders*, by Czinkota, Rivoli and Ronkainen and *Problems of the third world in a global economy* by P. Dicken) of which PSI has English copies;
- Labor Research Review, especially editions 13, 15 and 23 on global solidarity. These
 editions contain much material useful for the case studies which these modules call for
 participants to create;
- Brendan Martin, In the Public Interest? Privatisation and Public Sector Reform, published in association with PSI by Zed Books, U.K. Original book in English but translations exist in Finnish, French, Japanese and Turkish - contact PSI for information on these latter:
- Public Services International, *Democracy, Human and Trade Union Rights in Africa,* 1994, in English and French;
- Public Services International, The Economic and Monetary Union: consequences for the public service and public service workers, available from PSI in English, French, German, Spanish and Swedish;
- Public Services International in association with CRIES, The Impact of Structural Adjustment Programmes on the Public Sector in Central America and the Caribbean, English;
- Public Services International, Social and Economic Consequences of the Global Economic Crisis, mainly focuses on women - in English, French, German, Spanish and Swedish;
- Public Services International, *FOCUS*, a quarterly magazine which often covers issues central to the alternative strategy in English, French, German, Spanish and Swedish;
- Public Services International, Public Service Practice Handbook, available from PSI in English, French and Spanish, a publication which gives both guidance and examples of unions involved in public sector reform and contracting out;
- Richard Rothstein, 'The global hiring hall: why we need world-wide labour standards' in *The American Prospect, Spring, 1994, No. 17;*
- Third World Resurgence and Third World Economics, publications of the Third World Network, 228 Macalister Road, 10400 Penang, Malaysia. The Network publishes material in English and Spanish;
- United Nations Development Programme (UNDP), the Human Development Report for each year - Arabic, English, French, German, Italian, Portuguese, Russian and Spanish;
- United Nations World Summit for Social Development, Copenhagen Declaration on Social Development and Programme of Action, available from PSI in English, French and Spanish.

 World Bank, World Development Report 1995: Workers in an Integrating World, recommended because of the debates it will cause! - in English at least. In fact, the World Bank produces a World Development report each year on a different theme.

In addition, PSI and the European Public Services Committee often publish papers on alternative strategy topics.

INTRODUCTORY SESSION

Before beginning the first module, facilitators will need to conduct a short introductory session. Usually this includes:

- an exercise for participant and facilitator introductions;
- an opportunity for participants to identify their goals and expectations;
- an overview of the course objectives and agenda and how these relate to participant expectations;
- an explanation of the learning methodology used on the course;
- development of a group agreement on rules for a comfortable and productive learning environment; and
- any administrative matters that need to be covered in relation to participants' attendance at the course.

CHALLENGING THE NEO-LIBERAL AGENDA

The purpose of this module is to identify the present situation facing workers and their unions. Participants are provided with the opportunity to describe what they see happening in their own economies - the changes taking place and the forces/policies driving those changes. The link is then established between these policies and a particular set of neo-liberal economic values, or ideology. This approach grounds the course in participants' current knowledge and understanding and makes it relevant to their experience.

It is not enough, however, for trade union leaders to have knowledge about current economic policies. They also need to have a clear understanding of how these policies are working nationally and globally, who benefits and who suffers, and what the overall impact is on a nation's living standards. It is this kind of analysis that equips leaders with the arguments and data they will need if they are to convince others that an alternative economic approach is both necessary and possible. Union leaders should be encouraged to 'get real' in these discussions. Approaches such as: They're 100% wrong and we're 100% right; or Nothing needs changing; it's okay as it is; or Change is management's responsibility, not the union's will not wash with members who do the day-to-day work.

The learning activities in this module should heighten leaders' conscious awareness of how the neo-liberal agenda seriously jeopardises the economic and social well-being of workers and nations. This, hopefully, will provide a motivation to take action for change.

Objectives:

- → to identify the values that form the neo-liberal ideology
- → to identify the main elements of the neo-liberal agenda
- → to analyse the impact of neo-liberal economic policies
- → to frame arguments that challenge the neo-liberal agenda

Format:

1.	Introduction	10 mins.
II.	What the neo-liberals believe: A brainstorming exercise	15 mins.
III.	What the neo-liberals are doing: Discussion workshops	75 mins.
	Note: a "workshop" is a small group which is set a practical task to complete).	
IV.	Are the neo-liberals right? "What if?" exercise	60 mins.
V.	Summary	5 mins.

Activity Sheets:

(All Activity Sheets are to be found after the relevant module)

Activity 1: "A union leader's view of the economy"

Workshop discussion guide

Activity 2: "What would you say if...?"

Resource Handouts:

- Case studies: trade unions using the modules for this course should try to prepare in advance simple case studies from their own country or region which illustrate for an industry (including the public sector), a country or the region as a whole the real impacts of the neo-liberal ideology in the areas highlighted in the strategy paper: deregulation (meat inspection or urban transport, for example); labour market deregulation (falling standards in the education and health sectors as a result of precarious employment contracts and changes in trade union legislation); the social wage (the increase in the number of the homeless or in begging); taxation (the way that big business pays little or nothing while the share of taxation from workers and consumers has increased); inflation and interest rates (the erosion of the worth of salaries or the increase in mortgage costs for new homes); free trade (the impact on local farmers or other primary producers or the loss of export earnings for key resources); technology (the 'dumping' of obsolete technologies from the North to the South or the unplanned introduction of technologies which cause unemployment). It is preferable that a union create its own material in these areas but, with enough notice, PSI can sometimes provide assistance. It is important to challenge people to be honest in the creation of these case studies: sometimes free trade or deregulation can create jobs and increase salaries.
- Amazing facts: this material may come from the case studies. The idea is to present simple one-line statements or figures which act a basis for immediate reactions and discussion: unemployment rates; figures on the homeless; the increase in bankruptcies; the percentage of enterprises now owned by multinational companies; etc.

Module I

CHALLENGING THE NEO-LIBERAL AGENDA

I. Introduction

To start the session on an active note, conduct a brief "line-up" exercise with the group. In this exercise participants place themselves in a line according to their opinions about a particular statement. If they agree fully with the statement, they place themselves at the right end of the line. If they disagree, they go to the left. Then there are all the opinions in between. Participants will need to talk to each other in order to determine where they should place themselves in the line.

Once the line is formed, the facilitators ask participants at each end and near the middle why they placed themselves at that position in the line. The purpose of the exercise is to start participants talking together without interrupting one another and to get a sense of the different opinions and ideas in the group. People should feel free to move closer to or further from a speaker while she/he is still speaking to show how they are being affected by what she/he says: they can move 'outside' the line to form a new axis to show that the issue is more complex. It is not the purpose to engage in lengthy discussion or debate.

It is suggested that facilitators do at least two line-ups using two different statements. If time and group interest permit, you may choose to do more. Following are possible statements to use or facilitators may come up with some of your own:

- ◆ Tackling their huge deficits has to be a major economic priority of governments.
- ◆ Individuals need to take on more responsibility for their own economic and social welfare. Currently, there is too much reliance on the state.
- ◆ The free market can be a democratic way to produce and distribute goods, services and wealth.
- ♦ Government regulations often discourage business and investment.

Close the exercise by commenting on the range of ideas in the group and encouraging participants to take advantage of discussions during the course to explore these ideas in more depth.

Outline the objectives and format of the module.

II. What the neo-liberals believe

To identify the set of values that underlies the neo-liberal economic agenda, conduct a brainstorming exercise in *triads* (groups of three). The triads all have the same *task*, i.e.:

In the time available, brainstorm your ideas about the values neo-liberals hold which shape their decisions and actions regarding economic policies.

In the full group first draw out one or two examples of these values, so that the triads will be on the right track when they brainstorm. Also, ensure participants understand the distinction between a value (something we believe in) and a policy (a prescription for achieving it). Again, you may have to use examples to explain the distinction.

Provide the triads with 5 -10 minutes for this short brainstorming exercise.

Reports: Take the triad reports "round-robin" style (i.e., one idea from each group until all ideas have been posted). The facilitator should record the values on flip chart as these are identified.

Once the triads are finished reporting, check to see if there are any additional values participants would suggest adding to the list. Also, there may be some significant values missing that the facilitators will need to introduce. If any participants disagree with items identified as neo-liberal values, allow the group the opportunity to explore the issues involved.

A comprehensive set of neo-liberal values established by the group might include (refer group to the introductory paragraphs to the section on Conservative Ideology in the *Alternative Strategy document*):

- The private sector/free market can do all things better than can the public sector
- ₱ big government is bad for business
- Profits/capital accumulation must be the primary goal of the economy
- competition is the best way to ensure efficiency
- Iabour is only a factor of production
- ? individualism over collectivism
- opposition to trade unions is justified because they stand in the way of change and progress

III. What the neo-liberals are doing

Advise the group that they will now have the opportunity to identify the economic policies and measures that flow from a neo-liberal ideology. In addition, they will explore the impact of these policies.

Divide participants into discussion groups of 4-6 people. Distribute and explain *Activity 1: A Union Leader's View of the Economy*. Remind the workshops to select a reporter and request that they record their major points on flip chart. Allow 30-45 minutes for the workshop discussions to take place.

Reports and Discussion: Reconvene the group in full plenary and invite each workshop to present its report. Allow participants to ask questions or seek clarification after each workshop report. To avoid repetition, request that each successive reporter focus on those points that have not already been highlighted in a previous report.

Once all the reports have been presented and discussed, the facilitator should summarise the major forces/policies identified by the workshops and the effects of these policies.

These should include:

- ✓ cutbacks in the public sector ⇒ privatisation
- ✓ shifting the "tax burden" ⇒ reduce taxes on business and the rich
- ✓ orchestrated "tax revolt" of the middle classes: ⇒ the 'value for money' policies
- ✓ high interest rates to control inflation and the money supply
 ⇒ high unemployment
- ✓ manipulation of interest and exchange rates by currency traders/speculators
- ✓ deregulation, especially of the labour and financial markets
- ✓ reductions in social programs and services (e.g., health, education, welfare, unemployment benefits, pensions, etc.)
- ✓ free trade/"level playing field"
- ✓ IMF/World Bank ⇒ structural adjustment policies
- exploiting the anti-worker implications of new technologies rather than pro-worker possibilities
- ✓ lowering expectations of workers about employment security and standards of living

To complete this section, invite participants to evaluate the neo-liberal agenda. For example, the facilitators could post the following continuum on flip chart and invite participants to each place a dot at the spot on the continuum which represents their assessment of the neo-liberal agenda. [This could be done as participants leave the classroom for a break].

Totally		No Effect		Totally
Ineffective				Effective
	Somewhat		Somewhat	
	Ineffective		Effective	

Also, ask participants to write down on the flip chart the one word they each feel best describes the neo-liberal agenda.

IV. Are the neo-liberals right?

We can anticipate that trade union leaders are more than likely to be highly critical of the neo-liberal agenda. Based on their experience, they will judge neo-liberal policies as misdirected, ill-judged, 'correct' but dishonestly applied, disastrous, destructive, self-serving... etc. Union leaders, however, must recognise that it is not enough to criticise the neo-liberal agenda. They need to be able to clearly point to its weaknesses, provide thoughtful and forceful arguments to challenge the agenda, and, wherever possible, back up these arguments with facts and data which show the negative consequences of neo-liberal policies for workers and for society as a whole. This is a necessary first step to introducing credible alternatives.

The exercise, "What would you say if...", gives participants the opportunity to frame arguments that can challenge the neo-liberal agenda. Divide the group into workshops of 4-5 participants each. Distribute Activity 2, along with the resource handouts which have been prepared in advance.

Provide a few moments for participants to read the statements on the activity sheet. Do a quick straw poll to identify which statements they think would be the most difficult to argue against (for whatever reason). Assign each workshop one of these statements and then explain the workshop instructions to the group. Provide 30 mins. for the workshops to complete the task. [Depending on the size of the group and the time available, it may be possible to assign each workshop two statements].

[Another option is to set up the exercise as a role play scenario. Workshops would each prepare two of their members to role play a statement, response, counter response, additional argument, etc. Following each role play, the full group would provide feedback on the arguments which were effective in challenging the neo-liberal position].

Reports and discussion: Take workshop reports in turn. After each report encourage general discussion by inviting participants to ask questions, offer comments and/or suggest additional arguments that would be effective in challenging the statement.

Conclude this section with a discussion on sources of information and statistical data and the ways in which they can be used honestly or dishonestly by both parties. The facilitators may want to have samples available of magazines and publications that are alternatives to the mainstream media.

V. Summary

Briefly review what the group has accomplished during this session. To reinforce the learning in this module, refer participants to 9 topics under the section on Conservative Ideology in the "Alternative Strategy" document.

ACTIVITY 1:

A UNION LEADER'S VIEW OF THE ECONOMY

Workshop discussion guide

- 1. As a group, discuss the following questions:
 - ⇒ How are the workplaces of your membership changing? How is your country's economy changing? What inroads is the global economy making? (Be specific)
 - ➡ What is causing these changes? What forces are at work? (Consider corporate actions, government policies, the role played by workers and their trade unions, the role played by financial institutions, Transnational Companies etc.)
 - ➡ What is the effect of the changes: on your membership; on your union; on your society?
- 2. Record your major points on flip chart.

Select someone to present your group's report when the plenary reconvenes.

ACTIVITY 2

CHALLENGING THE NEO-LIBERAL AGENDA

Workshop instructions

"What would you say if someone said to you..."

- "We're in a recession, we can't afford all these social programs, we just have to tighten our belts".
- "We need to cut spending, privatise and freeze wages really make our economy lean and mean if we're going to compete in the global market".
- "Privatisation is good for the economy and its good for quality. It creates competition and that brings out the best in service".
- "We can't tax the wealthy too much we need to leave their money in circulation so that they can create wealth and jobs".
- "Deregulation can break up monopolies like telephones, banking and airlines. It creates more competition and gives the consumer better choices. If government leaves business alone, we're better off".
- "Government should get out of delivering social programs, the private sector can do it better - government should create a favourable climate for business and let the market do the rest".
- "Third world countries need to focus their economies on production of goods for export.
 This will give them the foreign currency they need to pay off their debts and improve
 their standard of living".
- "If Transnational Companies are opening plants in the Third World that's good. All these
 workers want is a chance to enjoy some of the prosperity enjoyed in Europe and North
 America. Unions are just being selfish by opposing things like NAFTA (North American
 Free Trade Agreement)".
- "If third world countries are forced to pay increased minimum wages, people just get thrown out of work. The free market helped North Americans get to the point where they don't have to work for such low wages now. Things will improve on their own over time".
- "If countries are in debt, they've got to tighten their belts they can't expect high levels
 of prosperity or human rights overnight".
- "Mergers, foreign take-overs and buyouts will streamline companies and make them more efficient. That's good for the economy in the long run".
- 1. For the statement(s) your group has been assigned, discuss what arguments you would use to challenge the statement. (Be clear and specific).
- 2. What information or data would help reinforce your arguments. How could your union obtain this information.

3. Record you major points on flip chart. Select a spokesperson to present your workshop report when the full group reconvenes in plenary.

NOTE: Two handouts, "Case Studies" and "Amazing Facts", have been provided as additional resource material for this workshop.

ASSERTING AN ALTERNATIVE STRATEGY

During this module participants have the opportunity to explore elements of an alternative strategy for economic development and prosperity on a global scale. The exercises and discussion should introduce, and reinforce, ideas for economic policies and programs that represent viable alternatives to the neo-liberal agenda. By the end of the module trade union leaders should be more confident in their knowledge of the issues and in their ability to promote these alternatives to their memberships, the public, and governments.

The module first establishes the values that underlie the trade union vision of a model economy and society. We anticipate that these values will be significantly different from the neo-liberal ideology identified in Module I. It will be important for trade union leaders to see that this represents a clash of ideologies and that an alternative strategy would be misdirected if it focused on engaging in an "ideological war". Rather, an alternative strategy must encompass a wide range of specific policies, programs, and measures that have direct, tangible application to people's lives. It is at this level that working people, and citizens generally, will relate to the meaning of alternatives for themselves, their families and their communities. Values are important to explore because they ground our vision, but that vision itself must be presented in terms of practicalities, not ideology, if it is to be embraced by those outside the trade union movement.

The main emphasis of the module then is on specific economic alternatives that trade union leaders are prepared to promote within their own constituencies and to co-operate on internationally. Because the scope of such an exercise is so large, it is important to come to it with realistic expectations. In the time available, participants will really only be able to highlight some of the more significant policies and measures. An in-depth exploration of each and every conceivable alternative is just not possible, nor is it necessarily useful in this setting and context. The objectives will have been well met if the module encourages trade union leaders to be thoughtful and creative in their exploration of specific issues and motivates them to be proactive in taking action to further develop and assess an alternative economic agenda.

Objectives:

- → to redefine economic goals in terms of wider trade union values
- → to identify the major national and international elements of an alternative strategy for social and economic development, co-operation, and prosperity

Format:

I.	Introduction	5 mins
II.	Trade union values: Triad exercise and plenary discussion	25 mins
III.	Trade union alternatives: discussion groups, presentations	145 mins
IV.	Summary	5 mins

Activity Sheets:

"Building blocks for a democratic economy" Workshop discussion guide Activity 3:

Module II

ASSERTING AN ALTERNATIVE STRATEGY

I. Introduction

Make a link with Module I by commenting on the "parallel" nature of the process - i.e., neo-liberal ideology directs the neo-liberal agenda; so too, a trade union alternative strategy flows from a set of values that inform our vision of a democratic economy. Outline the objectives and format of the session.

II. Trade union values

Use the following brief exercise to quickly establish the values that underlie trade union goals for the economy:

Triad exercise:

Divide the participants into groups of three. Refer back to the list of neo-liberal values established in Module I and assign each triad two or three items from the list. For each item assigned, ask the triads to decide -

- Do you agree with this value/goal? If so, for what reasons? <u>OR</u>
- Do you disagree with this value/goal? If so, what would you replace it with and why?

Provide 10 minutes for the triads to complete the exercise.

Plenary reports and discussion: Take each triad report in turn and invite participants to offer comments or ask questions. As the groups report, develop a list of trade union values/goals on flipchart. When the reports are completed, check if there are important trade union values/goals that participants think should be added to the list. Some of the trade union values that we would expect to emerge from this exercise might include:

- economy focused on meeting people's/society's needs (e.g., food, shelter, health, education, family services, etc.)
- & democratic control in the workplace and in society
- growth through development, especially sustainable development which benefits women and rural communities
- b full employment
- fair distribution of wealth, including between men and women
- & strong, effective and efficient public services
- by global co-operation both among trade unions but also among governments

- maximising social goals (e.g., equity, human rights, equal opportunities for women and men)
- collectivism
- workers' rights/trade union rights

Conclude this section by commenting on the opposing nature of the two sets of ideologies. Caution participants that this is very difficult ground on which to challenge the neo-liberal agenda. It is very difficult for either side to win an "ideological war". Where cracks in the neo-liberal value-set can be exposed is in focusing on policies and programs that would make a difference in the quality of people's lives and their communities. These are more real and immediate to the general populace than are a set of ideological values. However, it is important to confirm our value set for ourselves, as this must be the solid foundation upon which we build an alternative strategy.

III. Trade union alternatives

The group will now begin to work on specific elements of the trade union alternative strategy.

Distribute Activity Sheet 3: "Building blocks for a democratic economy", review the workshop instructions with the group, and explain how the panel presentations exercise following the workshops will proceed.

Explanation of the panel presentation exercise:

When the group reconvenes in plenary, each workshop reporter will be a member of a panel on *Economic alternatives: A vision for the future*. The remainder of participants will act as an audience of government and business leaders who are at a conference where trade union leaders have been invited to speak and share their views on the economy. The facilitator will act as the moderator for the panel (i.e., introducing speakers, ensuring time limits are respected, co-ordinating questions from the floor, concluding the panel, etc.). The classroom will be set up theatre style with a table at the front for the panel of presenters.

Each panellist has a maximum of 7 minutes in which to make a presentation (i.e., the workshop report). Once all the presentations have been delivered, the moderator will open the floor for a 15 minute question period. Members of the audience may direct questions to any of the panellists. Because participants are adopting roles of government and business leaders, their questions will likely challenge the panellists' views. This simulates how, in reality, trade union leaders have to be prepared to meet such challenges with convincing arguments that support their alternative vision.

The moderator should make brief concluding remarks to close the panel.

Workshops: Divide participants into workshop groups (number depending on size of group, time available, knowledge levels, etc.) and provide **75 minutes** (1 and 1/4 hours) for the workshops to complete their discussions and prepare their presentations. Aim for a maximum of four workshops. [If time is an issue, you may choose to instruct the workshops to focus on two specific issues rather than three. Also, be sure to emphasise the request that workshops not focus on public service issues at this time, as the next module is devoted exclusively to the public sector].

Panel presentations: Carry out the panel as described above.

Plenary round-up: In the time remaining following the panel exercise, invite general comments from the group on the ideas that have emerged from the different presentations. Also, encourage participants to share their thoughts on how they can now take these ideas and go forward with them, i.e., What is the next step? You may choose to structure the latter question as a short exercise in which each participant writes down one action he/she is going to take to advance these alternatives, and then facilitate a round during which these individual ideas are shared with the group. This kind of closing exercise often produces a number of practical ideas that participants find useful and motivating.

IV. Summary

Briefly highlight the main elements of an alternative economic strategy that have been developed during this session. Refer participants to the section on The Trade Union Alternative Strategy (sub-sections: The government's choice, and International cooperation among governments) of the Alternative Strategy document for additional information and reinforcement.

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ACTIVITY 3:

BUILDING BLOCKS FOR A DEMOCRATIC ECONOMY

Workshop discussion guide

- 1. In your group identify and discuss what you consider to be three essential elements of an economic strategy that represents a credible alternative to the neo-liberal agenda. These may be policies that relate to trade issues, employment issues, social issues, international finance issues, etc.
- 2. Prepare one member of your group to present your report during the panel presentations following the workshops. In your report,
 - ⇒ clearly describe the economic policies or programmes that you propose, including your approach to involvement in the global economy;
 - ⇒ explain the advantages and benefits of each of these policies;
 - ⇒ outline what initiatives/responsibilities government, business and the community must take to implement these policies; and
 - ⇒ describe the role that trade unions should have in this process of economic planning and decision-making.

The reporter will have seven (7) minutes maximum in which to make your group's panel presentation.

NOTE: Do not focus at this time on issues related to the public sector as this is the subject of a separate module.

REDESIGNING THE ROLE OF THE PUBLIC SECTOR

The attack on the public sector is a key element of the neo-liberal agenda and poses a particular challenge for the leaders of public service unions. This module, therefore, provides participants with the opportunity to focus specifically on issues related to the public sector and to develop alternatives that can be promoted to union members, the public and governments.

The comprehensive nature of the attack on the public sector creates a wide range of issues for union leaders to deal with. In order to cover all these issues adequately within the short time-frame available, workshops have been designed so that the issues are categorised - i.e., role of the public sector; kinds of public services; delivery of services; and funding of services - and divided among small groups.

The overall design of the module is in the "problem-solution" format. That is, participants first have the opportunity to share information about their experiences and put together an overall picture of the challenge that currently faces the public sector and therefore public sector unions. Then, in the second set of workshops, participants are encouraged to respond positively to the challenge by developing specific, concrete proposals for improving the quality, effectiveness, efficiency, and equability of public services. Participants are also requested to identify key components of a strategy, or "plan of action", for promoting these solutions as practical and economical alternatives to the current mass of neo-liberal criticism and privatisation/commercialisation policies.

There may be a tendency for union leaders to feel overwhelmed by the enormity of the assault on the public sector. An initial reaction may be to retrench and defend existing methods and structures, even where these are obviously in need of reform. Facilitators need to be conscious of this possibility and encourage thinking that is positive, creative, innovative, and forward-looking. It is important for union leaders to have faith in their ability to offer viable alternatives that will preserve and improve public services as an integral component of a healthy global economy.

Objectives:

- → To identify major challenges facing the public sector and public service unions
- → To define a valued and dynamic role for the public sector in a changing, global economy
- → To explore options for the organisation and delivery of public services in the context of the alternative strategy

[Note:

Participants should be encouraged to read the following sub-sections of the Alternative Strategy document before coming to this session: The role of the public sector in a strong economy; Funding the state; and Redesigning the public sector].

Format:

1.	Introduction: Word association exercise	5 mins.
il.	The challenge to the public sector: Discussion workshops	75 mins.
III.	Responding to the challenge: Discussion workshops	95 mins.
IV.	Summary	5 mins.

Activity Sheets:

Activity 4: "The challenge to the public sector" Workshop discussion guide

Activity 5: "Workable alternatives: A trade union response" Workshop discussion guide

Module III

REDESIGNING THE ROLE OF THE PUBLIC SECTOR

I. Introduction

Begin the module with a quick word association exercise. Write *public services* on the flip chart and ask participants for the first word or phrase that comes to mind when they see/hear these words. List participants' responses (1-3 mins.).

Examine the list of responses with the group and identify if these reveal any "themes" - e.g., the value of public services; the attack being made on public services; etc. Link these themes to the proposition that a key element of an alternative economic strategy is a valued and substantial role for the public sector. Also, comment on the significant role that leaders of public service unions are required to play in ensuring that public service issues are debated in a positive and constructive way and are linked directly to the goal of a healthy economy.

Outline the objectives and format of the session.

II. The challenge to the public sector

To explore some of the major challenges presently facing the public sector and to provide an opportunity for union leaders to share experiences in this regard, establish the workshops outlined in *Activity 4: "The challenge to the public sector"*.

Divide the group into four workshops and assign topics as outlined. Provide **45 minutes** for the groups to complete their discussions.

Workshop reports: Take each workshop report in turn. After each report, provide an opportunity for questions, comments and suggestions. This process may result in the group deciding to make additions to a workshop report in order for it to be complete and to reflect the full range of experiences in the group.

Examples of the criticisms/challenges that this exercise should reveal include:

<u>CRITICISMS</u>

- Most public services could be more economically and efficiently provided by the private sector
- Investment in public services is "nonproductive"
- Public services are too costly they create huge deficits and are no longer affordable

CHALLENGES

- Maintaining democratic control of public services in the face of privatisation/contracting-out and activities of Transnational Companies
- Maintaining standards while decentralising
- Addressing the needs of marginalised groups

- Public service workers are overpaid/corrupt/incompetent/lazy
- The public service is a "bloated" bureaucracy
- Social programs destroy people's willingness to work and support themselves/they are a "disincentive"
- "Over-regulation" discourages business investment
- Improved public services means increased taxes

- Rights of public sector workers
- The "business" approach to the provision of public services
- Downloading responsibility to the "voluntary" sector
- Avoiding waste and abuse in public expenditures
- Adjusting public services to social changes, including regional/global trends
- Alternative sources of funding
- Providing more efficient, better structured public services

III. Responding to the challenge

Having clearly identified the scope of the challenge currently facing the public sector, participants will now have the opportunity to develop a response to that challenge.

Distribute the sheet for Activity 5: "Workable alternatives: A trade union response". Explain the workshop instructions to the group. Advise the workshops to use the relevant sections of the Alternative Strategy document as a resource handout for their discussions.

Divide the group into the four workshops required. These can be the same groupings from the previous exercise, or, participants may want to change groups and work on different topics. Either division should work well as all participants have the information from Section 2.

Provide 60 minutes for the workshops to complete the task.

Workshop reports: Take each report in turn, allowing time for group discussion after each presentation. If any proposals are contentious, allow sufficient time for the group to work through the issue(s) and resolve disagreements. Aim to achieve consensus that the ideas and proposals put forth by the workshops represent a viable set of alternatives and a blueprint for action by trade union leaders.

IV. Summary

Summarise the highlights of the session, noting in particular the various actions that the leaders have included in their plan. Refer once again to the relevant sections in the *Strategy Document* as a source of information and analysis.

ACTIVITY 4:

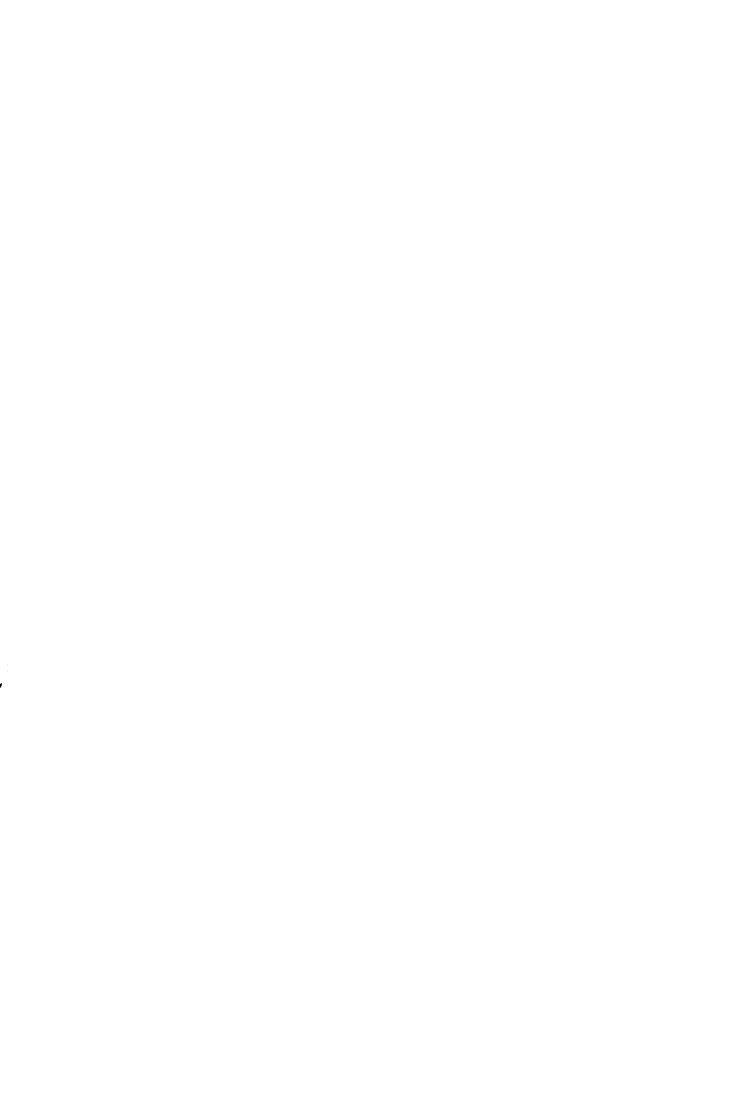
THE CHALLENGE TO THE PUBLIC SECTOR

WORKSHOP#	WORKSHOP TOPIC
1	The role of the public sector in the economy
2	The kinds of services provided by the public sector
3	The delivery system for public services
4	The funding of public services

Workshop discussion guide

- 1. In relation to the topic assigned to your group, discuss the following questions:
 - ⇒ What are the major criticisms or challenges that currently face the public sector?
 - ⇒ Where do these criticisms/challenges come from, including forces outside your own country?
 - ⇒ What is the motivation behind them?
- 2. Prepare a workshop report with your points on the first question recorded on flip chart.

Select someone to deliver your group's report when the plenary reconvenes.



ACTIVITY 5:

WORKABLE ALTERNATIVES: A TRADE UNION RESPONSE

WORKSHOP#	ASSIGNED TOPIC
1	The role of the public sector in the economy
2	The kinds of services provided by the public sector
3	The delivery system for public services
4	The funding of public services

Workshop resources:

- Workshop report presented on this topic during the previous session, in particular, the list of challenges that were identified. [The relevant set of flip chart pages should be available to your group as reference material].
- ✓ Also, the reports (panel presentations) from "Building blocks for a democratic economy" provide a context for your discussions in this workshop.

Workshop discussion guide:

- 1. For each criticism/challenge identified by the previous workshop, discuss the following questions:
 - → How should trade union leaders respond to this challenge?
 - ⇔ Where you think change or improvement is needed, what <u>specific</u> proposal(s) would you put forward?
 - ⇒ If you think there is no solid justification for the criticism/challenge, what argument(s) would you put forward for preserving the status quo?

NOTE: In formulating your responses, be mindful of the goal of public services that are democratic, comprehensive, effective, efficient, economical and equitable. Include international public services such as United Nations agencies in your discussions.

Work through as many of the criticisms/challenges that were included in the workshop report as time allows. However, ensure you have sufficient time available to discuss the following question:

- ➡ What specific steps or measures should union leaders take to advance these proposals as a viable alternative to neo-liberal policies? What would be included in this "plan of action"?
- 2. Prepare a workshop report, highlighting your major points on flip chart.

Select someone to deliver your group's report when the plenary reconvenes.

BUILDING GLOBAL SOLIDARITY

It is hoped that by this point in the course participants will be able to identify the need for global solidarity and international co-operation. They will recognise that such a movement is key to the success and effectiveness of any alternative strategy for democratic and prosperous economies. In this final module participants will have the opportunity to give some practical meaning to the "concept" of global solidarity. They will be challenged to develop a set of initiatives for building an international power base of worker action. It is from such a power base that working people can mount an effective challenge to the policies and practices of international capital and the seeming immunity of multinational corporations to any semblance of democratic control.

Global solidarity is one theme that ties together all the work accomplished on the course. It is at the core of the alternative economic strategy, including the alternative vision of public sector reform. At first glance, it may seem like an idealistic goal and a monumental, if not impossible, task. But some people may want to treat international issues/action as a separate action/level: try to get them to locate international contacts/solidarity in local day-to-day work. But exciting things are already happening. There are examples of international trade union action taking place now and they prove that the possibilities are limitless. Some of these examples, described in case studies and participants' own experiences, are examined for the lessons that they teach union leaders about effective international solidarity campaigns.

Participants are also called upon to be creative and develop ideas for initiatives they can take to strengthen the "movement" towards global solidarity. Of particular significance is the role they can play in building bridges across the national and cultural divides that tend to separate workers and keep them isolated from each other. The more workers are able to communicate together, the more difficult it will be for employers and governments to discriminate, exploit and oppress.

The module ends the course on an energetic and optimistic note. It focuses on how workers are taking control of their working lives and demanding an equal place in the decision-making processes that affect them. Hopefully union leaders will leave the course with renewed confidence in themselves and their unions and a strong commitment to work towards their vision of a democratic global economy.

Objectives:

- → To define the meaning of global solidarity in light of economic imperatives
- → To explore key elements of international solidarity campaigns
- → To develop initiatives trade union leaders can take to mobilise a movement for global solidarity

Format:

Introduction: "In one sentence..." exercise
 The case for global solidarity: Discussion/case studies
 Mobilising a movement: Discussion groups
 Summary
 Introduction: "In one sentence..." exercise
 Mobilising a mins.
 Mobilising a movement: Discussion groups
 Summary

Activity Sheets:

Activity 6: "Mobilising a movement":

Workshop discussion guideline

Resource handout:

Global solidarity: Case studies. It is useful for each trade union to compile in advance short examples of how they have participated in solidarity campaigns with other trade unions or non-governmental organisations (NGOs), Such examples could include; a trade union which receives funding directly from a union in the North for education work (or, in the case of Northern unions, examples of how and why they provide such funds); stories which illustrate how trade unions work together in dealing with a Transnational Company or in cases of violations of trade union and other human rights - such as fax and letter or poster campaigns over the intimidation or murder of trade unionists in Guatemala, Turkey, Korea; the development of 'twinning' relationships between unions which regularly exchange delegations or staff members for training or observation: examples of unions which have been able to receive or send information or resource material which has helped in negotiations with an employer. But these case studies should not focus only on trade union solidarity. NGOs can be valuable partners with trade unions in many of the issues raised in the strategy paper: environmental campaigns, women's struggles for equality; combating child labour; trade-aid organisations. The message should be short and simple: we are not alone and, with others, we can often make a major difference even to global events.

Module IV

BUILDING GLOBAL SOLIDARITY

I. Introduction

If the group has previously touched upon the issue of global solidarity, introduce this module by recalling the comments that were made. Place it in context as a key element of the alternative strategy, the growing power of international capital making it imperative that labour organise more effectively on a global scale.

If the group has not previously raised the issue, introduce global solidarity in the context mentioned above. Also, facilitate a brief discussion with the group about why global solidarity is essential to the effectiveness of an alternative economic strategy.

To ensure participants are all speaking of the same thing when they use the phrase, "global solidarity", conduct the following brief exercise:

Divide the group into triads. Each triad has 10 minutes in which to complete the sentence, "Global solidarity is...". Clarify with the group that they must use just one sentence to define what global solidarity means to them. Request the triads write their sentences on flip chart. Once they have completed their sentences, have the triads post these at the front of the room. As a group, examine the definitions and identify how these reflect a common understanding and sense of purpose. If there are any glaring contradictions among the definitions, explore these together with a view to resolving the differences.

Complete this section by outlining the objectives and format of the module.

II. The case for global solidarity

The purpose of this section is to inspire and motivate participants with examples of actual solidarity campaigns. These examples bring global solidarity down to earth and reveal how grass roots organising can happen across international boundaries and contribute to positive change in situations where workers are being oppressed. They also provide valuable information about the strategies and tactics that are effective in mobilising workers and citizens in different countries to identify and support a common cause.

As noted above, it is essential to include in these discussions the ways in which trade unions and NGOs can work with another. It is tempting in many of these discussions to focus on the problems in these relationships. While these should not be downplayed, try to find ways of turning the problems into challenges which can force us to think of more effective ways of achieving our objectives.

First, start with participants' experiences. Ask group members to identify if they have knowledge or experience of international solidarity or have actually played an active role in such a campaign. At this stage, it does not really matter if their experience is on a campaign/struggle entirely unrelated to the issues in the alternative strategy: the point is to learn from and about international possibilities.

Further, not many people will have been involved in a campaign that was purely international: many will have been involved in some local or national campaign or struggle where some organisation from abroad provided information, assistance or political support for just one small aspect. Encourage participants to describe and analyse their experiences. Following are some suggested questions to help you facilitate this process:

- What were the goals of the campaign/struggle where this international perspective was relevant? Were they achievable?* (for asterisked items, see the note below).
- What were the major elements of the campaign strategy?*
- What kinds of tactics were used? International tactics? Have governments or Transnational Companies used the tactic of pitting workers in the South against those in the North? Do workers in the North and South see themselves as having similar or opposed interests?*
- What were the major difficulties in the campaign? How might these have been avoided?
- What were the major strengths of the campaign?* How did these contribute to the campaign's effectiveness?*
- What was accomplished in relation to the campaign goals?
- In what ways was this a positive and motivating experience? What did you learn about the potential of international contacts?

As participants share their analysis of various campaigns, record major points on flip chart about goals, strategy, tactics, and strengths. Assess when there has been sufficient opportunity for participation and then wrap-up the discussion by reviewing the highlights (i.e., points on flip). Check with participants that they are satisfied with the way the discussion has been highlighted on the flip chart or if they think there are other significant points that should be added. Comment that the information shared provides a good outline of effective organising strategies and techniques for international solidarity campaigns.

To reinforce the ideas produced by the discussion refer participants to the handout, "Global solidarity: Case studies". Invite comments on how these examples are similar to or different from the participants' experiences. Also, check if they think these examples provide any additional points that the group should include in their outline of effective campaign organising.

[NOTE: *This handout should be distributed prior to the module and the participants encouraged to read it before coming to session].

[Alternate method:]

If there is little or no experience in the group with international solidarity campaigns, omit the group discussion and set up small groups to read and discuss the case studies included in the "Global solidarity" handout (see Module IV Overview).

Assign one case study per group and use relevant questions (marked with a *) from the above list as the discussion guideline. [These questions can be written on a flip chart and posted so that all groups can see them]. Provide 30 mins. for the groups to complete their discussions and remind them to select a reporter.

During the workshop reports, the facilitator should develop an outline on a flip chart highlighting the major points being made about organising effective international

solidarity campaigns. Once the reporting is complete, provide the opportunity for the group to review the highlights on flip chart and to add any ideas they think would make the outline more useful and complete. Also, encourage participants to share their reactions to the case studies - e.g., were they inspired?; motivated?; enlightened?; convinced that international solidarity is possible?

III. Mobilising a movement

In this final exercise, participants have the opportunity to brainstorm ideas about achieving global solidarity from their perspective as union leaders. Distribute *Activity 6: Mobilising a movement* and explain the workshop instructions.

Divide the group into workshops (number depending on size of group and time available) and provide 45 minutes for the groups to complete their discussions.

Workshop reports: After each group presents its report, invite participants to ask questions, seek clarifications, and/or offer comments or suggestions. Also, at the end of the reporting, invite overall comments from the group re: what they think about the ideas that the workshops have generated - e.g., are the ideas realistic? how will they be useful? Etc.

IV. Summary

Review the highlights of the module and re-emphasise the importance of building a movement for global solidarity.

As this is also the end of the course, a brief wrap-up exercise is recommended. You, the facilitators, will have ideas about appropriate closing exercises, or, you may choose to use one of the following suggestions:

- → Conduct a round during which each participant completes the following sentence:
 - The most important learning for me on this course has been... OR
 - The first thing I plan to do with what I have learned on this course is...
 OR
 - As a result of this course I am motivated to...
- → Invite participants to each identify the one word which best describes how they have been affected by the course?
- → Conduct a round during which participants share their individual responses to the following:

As a result of what I have learned on this course.

- I am going to start ...
- I am going to continue...; and
- I am going to stop...

Conclude with your own personal comments about the group and the course.

ACTIVITY 6:

MOBILISING A MOVEMENT



Workshop discussion guide

- 1. With reference to the work you have done on an alternative strategy for the economy and for public sector reform (i.e., workshops, *Building a democratic economy* and *Workable alternatives: A trade union response*), discuss the following questions:
 - ⇒ In what areas in your daily trade union work is there need for global solidarity in order for the alternative strategy to be effective? Why is global solidarity necessary?
 - ⇒ What difficulties do you anticipate and how can these be addressed?
 - ➡ With which other organisations would you explore the potential for international solidarity work where it is relevant
 - ➡ What role should trade union leaders play in building and supporting a movement for global solidarity? i.e., What <u>specific</u> initiatives can and should union leaders take, especially in the way they have their union staff and activists operate on a daily basis?
- 2. Record your major points on a flip chart.

Select someone to present your group's report when the plenary reconvenes.