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'Trade Union Pedagogy and Cross Border Action'

Christina Niforou and Andy Hodder

Introduction

The decline in national trade union membership and power across the globe in the last few decades, coupled with the globalization of capital and production has had a paradoxical impact on the world of work. On the one hand, it has intensified the 'race to the bottom' in terms of labour costs and rights but, on the other, it has also opened up space for the emergence of global counter-actors and strategies. There is ongoing academic and policy debate on the ability of Global Union Federations (GUFs) to act as a counterweight to the ever-increasing power of employers, by helping national unions build transnational alliances, engage in different forms of cross-border action and, most importantly, keep up-to-date with the evolving and increasingly elaborate capital tactics of regulation avoidance. In the words of Lillie and Greer (2007:7), providing an effective counterweight to global capital is 'an open-ended process involving workplace, national and transnational layers, rather than the nationally bounded process involving mutually reinforcing institutions, norms, and strategies'. Indeed, the failure of both national and global regulation to offer substantial labour protection has prompted commentators to call for more actor-centred approaches that make references to developments and actors in other countries (Lillie and Martinez Lucio, 2004).

In this paper, we argue for the role of global trade union pedagogy in enhancing the effectiveness of cross-border strategies through the use of actor-centred techniques that make cross-country as well as cross-industry references. We do so by bringing together the literatures on cross-border GUF-led activism and trade union education into a single framework that offers a comprehensive and integrative approach to global trade union education. Our argument is framed within current discourses on the potential of different forms of cross-border trade union action to deliver their foreseen objectives where most needed - on the ground. A review of relevant literatures reveals a mixed picture in terms of the impact of such action as the latter is both constrained and facilitated by the international and national regulatory environments of the actors involved in and affected by it. This seems

to be largely an outcome of political agency and choice, and is manifested in two ways. First, the ambiguous legal character of overlapping international regulation and their interplay with national and local labour jurisdictions allow for different interpretations by different groups of actors (in this case, trade unions). Second, in many occasions, cross-border campaigns either tend to neglect the needs of different unions at different levels (global/regional, national, local) or are based on presumptions as to what these needs are. Our review reveals a number of analytical issues which include (but are not limited to) the pertinence of local institutions, inter-union conflicts between and within different levels, a lack of communication between global and local unions, trade union openness to different strategies, path dependencies and access to resources.

We argue that, prior to institutionalizing soft and 'toothless' instruments at the global level, or engaging unions in cross-border campaigns driven by diverse interests and with tentative outcomes, trade unions need to learn how to improve existing practices of working together, not only across countries and regions, but also across industries. We are not claiming that effective education could put bite into 'toothless' instruments; rather that, by increasing knowledge and changing mentalities, it would help unions achieve their goals through (re)defining campaign objectives so that they reflect global and local realities without necessarily relying on soft global instruments and weak local labour institutions. Thus, our overarching question seeks to consider: What is the potential of global trade union pedagogy to enhance cross-border union action? More specifically, we ask: What is the role of different union actors (local and global) in both shaping and receiving the education curriculum? Can a GUF's pedagogic approach, agenda and methods address the structural and political challenges of campaigns, and if so, how? The primary contribution of our paper is the development of the framework. Whilst we predominantly leave its application to be tested in future research, we examine the relevance of the framework through the critical case of the education work of the International Transport workers' Federation (ITF).

The paper begins with an overview of the different challenges of cross-border action which culminates to a discussion of the significance of education as a way to coordinate differences across levels. The following section situates the notion of learning within wider discourses on trade union pedagogy and suggests a conceptual tool for organising analysis when examining the role of union learning in instances of transnational solidarity and campaigns. We then present the background to and justification for our case (ITF) selection, and we proceed to

elaborate on the different dimensions of our framework in relation to the education work of the ITF as a way to generate preliminary insights on the framework's applicability. We conclude by going back to our objectives, the literature and setting a future research and policy agenda.

The challenges of cross-border action

There is a vast literature on the role of GUFs and other union actors in supporting workers' rights through different types of cross-border campaigns and instruments. Whether in the form of transnational solidarity work, strategic research campaigns on organizing along global value chains, global framework agreements or global union networks, these strategies aim at establishing GUFs as a legitimate and powerful counterweight to global capital. The extent to which they have succeeded in their endeavour is, however, debatable. Up-to-date research can be roughly divided into two overlapping strands. The first comprises studies of the role of different GUFs as global labour actors (Croucher and Cotton, 2009), empirical work on conflicts and campaigns either led by GUFs or emerged from the bottom-up (Fairbrother et al, 2013) and assessments of their involvement in transnational union and other activist networks, codes of conduct and framework agreements (Hale and Wills, 2007; Fichter and McCallum, 2015; Bartley and Egels-Zandén, 2015; Niforou, 2012). While the empirical depth of these studies is undisputable, there is still much to be desired with regards to conceptual advancement. The second strand is dominated by more theoretically informed macro-level discussions on the future of global labour. Analyses allow for both pessimism (Burawoy, 2010) and optimism (Evans, 2010), or lie somewhere in the middle emphasizing that global capital provides not only constraints but also opportunities for new –or not so new- forms of action (Lillie and Martinez Lucio, 2012).

A review of both literatures reveals a number of structural and agency-related challenges. These challenges explain why 'GUFs have largely engaged in a patchwork of interventions in economic sectors, production networks and specific national settings rather than through a sustained transnational strategy' (Ford and Gillan, 2015:15). Early criticisms were targeted at GUFs' authority in terms of both their representation capacity and legitimacy. Sceptics were concerned with GUFs' lack of a formal mandate under national, European or international law that would allow them to represent the interests of their members through negotiation and bargaining (Sobczak, 2008). Others questioned their membership base the expansion of which can be affected in practice by the blurring boundaries between industries and sectors

(Niforou, 2014). Moreover, most GUF campaigns are usually top-down strategies built on perceived rather than actual shared interests. As Hyman put it (2005: 149), 'all too often official trade union practice seems implicitly to accept that internationalism is an elite concern, that it is safer if the membership does not learn too much of policies that they might perhaps oppose'. Global unions have responded to these challenges by mergers, multi-GUF cooperation and attempts for local union capacity building (Anderson, 2014).

Yet, the above responses raise further questions with regards to two interrelated issues: different types of campaigns and resource allocation. The increasing complexity of global supply chains has 'forced' GUFs to become more creative when forming cross-border strategies. Although such strategies have been given different names – such as 'comprehensive' (Juravich, 2007, or 'multidirectional', Gunawardana, 2007), they nonetheless share four common premises: they are based on strategic research in order to identify and gather information on lead firms, profit centres, intermediaries and different tiers of suppliers; they target more than one part of the supply chain simultaneously; they are broader in their scope involving different stakeholders such as non-governmental organisations (NGOs) and other labour activist groups; and they use the threat of reputational damage holding firms accountable to their very own targets and objectives as stated in their codes of conduct, guidelines and agreements. However, the success of these new types of campaigns depends, to a large extent, on how decisions on resource allocation are taken. Whether human (e.g. knowledge, leadership) or material (e.g. finance, infrastructure), resources are important in framing agendas and determining priorities (Hennebert and Bourque, 2014). The latter is far from an easy task to achieve given that national trade unions seem to perceive GUFs as a venue for resolving their local concerns which may not necessarily be in line with global prerogatives. For instance, in some occasions, local unions have unsuccessfully resorted to UNI Global Union and their global agreements for resolving internal tensions, rivalries and violations of representation rights (Niforou, 2012). The analysis of the conflicts revealed a lack of communication of and information on both the GUF agenda and the true nature and scope of the global agreement.

Indeed, although the strategic value of global campaigns is unquestionable, research has shown that it is at the local level where labour power is constituted and reconstituted. Yet, the global and local dimensions of labour internationalism seem to be 'working against each other' (Ramsay, 1997: 530). Academics and labour practitioners therefore agree on the

importance of relationship-building between the global and local levels of the union movement (Anderson, 2014; McCallum, 2013). Such relationships and networks would serve to emancipate workers through the realization of their common interests and the potential to exercise structural power using the resources (largely in terms of knowledge, information and expertise) of their international allies. However, building strong ties and hence a relationship of trust with local unions and workers often requires overcoming language and other cultural barriers through systematic and extensive face-to-face interactions (Hyman, 2005). The latter would equip local union officers with the tools to explain to members the threats of interfirm competition and the importance of comparative institutional advantage. It is the lack of a strategy relevant to global interfirm competition combined with the insularity of national trade unions which is considered the key barrier to the formation of a global collective identity (Anner et al, 2006). Yet, as Adanhounme and Levesque (2014:138) put it, the global/local dichotomy in the labour transnationalism discourse is essentially a 'false' one as there is no 'one best way' or universal recipe: instead, national political economies and local realities 'where protagonists own their stories' need to be taken into account.

Considering local realities is important for another reason. The discourse on the global/local dichotomy (whether false or not) echoes debates on the differences in interests, needs and hence strategic priorities of trade unions in the Global North and the Global South. Yet, the North/South divide is far from fictitious. For instance, unions from Philippines and India have in the past opposed efforts by the International Transport workers' Federation (ITF) to implement a global minimum wage in the maritime sector because it was perceived it would harm their countries' competitiveness (Lillie, 2004). Both countries supply a big chunk of the global maritime workforce at cheap rates and their strong disagreement with the ITF led to their disaffiliation (Anner et al, 2006). ITF addressed the challenge by applying different wage standards to different vessels depending on their flag which eventually resulted in the re-affiliation of the opposing organisations. At a more strategic level, the ITF uses education as a counterweight to the race to the bottom and inter-union antagonism. Indeed, the complexity and global reach of the transport supply chains has resulted in a growing focus on education as a tool for emancipation and awareness-raising regarding how the different segments of the sector offer platforms for labour leverage. The ITF agenda is driven by the premise that such leverage is achieved when affiliates realise that ultimately their interests are aligned. However, the race to the bottom is only one manifestation of the North/South divide. Often, path dependencies determine the type and quality (or even the lack of) cooperation

between the North and the South. Such path dependencies are evident in strong, institutionalised -and therefore hard to ignore- relationships between local unions and employers (Young and Beccera, 2014) and in the historical and ideological processes which characterised past efforts for solidarity. For example, Sukthankar and Kolben (2007:77) emphasize how the legacy of protectionism and racism evident in previous Anglo-Saxon attempts to collaborate with India can inform current practice and they call for 'an ongoing self-reflexive process' to ensure that the North does not treat the South in a purely instrumental manner.

Overall, top-down strategies engaging the Global South have severe pitfalls. Campaigns may generate quick results, but these results are usually ad-hoc and highly unlikely to be sustained in the long-run unless they accommodate local needs of capacity-building. The latter can be achieved through education the value of which has been advocated by both scholars and labour organisers (e.g. Croucher, 2004; Quan, 2008). Although different in scope and nature and surprisingly limited in number, these studies share a common premise. It seems that education can go some way towards changing competing visions and mentalities, (re)shaping identities, informing decisions on how resources are spent and ultimately strengthening multi-level links and relationships. Pulignano (2007:154), for instance, argues for a change in attitudes through education in order to coordinate national interests and orientations 'rather than simply align them as autonomous national and local trade union policies'. With regards to the role of education in the transnational unionism literature there is still much to be desired. Its significance is undisputable. Yet, as discussed below, there have been few attempts to conceptually and empirically address important education questions which include (but are not limited to) the approach to learning, the types and content of educational programmes, links with GUF strategies, top-down versus bottom-up dynamics, the tools and methods used as well as evaluation mechanisms.

Union education – an activist's pedagogy
Extensive literature considers the type of learning that unions are involved with at both a national and international level (e.g. Shelley and Calveley, 2007; Croucher and Cotton, 2009) but rarely does it consider the actual practices and processes of activist pedagogy (Stanford, 2015:235). Where this does happen, research tends to either briefly engage in describing the use of active-learning methods (ALMs) by unions (Croucher 2004), or consider unions as learning organisations (Gumbrell-McCormick and Hyman, 2013:196-197). Learning also

appears as part of the literature on union capabilities, defined as 'the ability to assess opportunities for intervention; to anticipate, rather than merely react to, changing circumstances; to frame coherent policies; and to implement these effectively' (Gumbrell-McCormick and Hyman, 2013:193). Learning is also identified as one of four strategic capabilities that is a 'critical capacity in the renewal process' (Levesque and Murray, 2010: 345). In a transnational trade union context (Fairbrother et al, 2013), this work is conceptually lacking in depth and detail, making brief references to the earlier work of Benford and Snow (2000) and Snow et al (1986) and is also limited in its discussion of the learning process, accepting it as something that is straightforward for unions to both trigger and embrace. Following Martin and Ross (1999) and Levesque and Murray (2010: 344), we highlight the importance of learning to the renewal agenda to provide a way for unions to escape 'well-worn tactics and actions that flow from existing repertoires of action, even when these approaches are not necessarily suited to changing circumstances'. Due to its potential importance in strategic change, we draw on the wider literature on activist pedagogy and propose a new framework specifically to deepen our understanding of the ways in which education can help engender international collaborative action.

** Figure 1 about here **

The starting point for analysis of unions should be interest representation. However, as stated earlier, this needs to be actual (rather than perceived) interests (Hodder and Edwards, 2015). Unions have been accused of being nation-centric, outdated and bureaucratic organisations, unwilling to change and may struggle with the 'unlearning' stage of learning process (Gumbrell-McCormick and Hyman, 2013:197). However, history matters, as does a union's national context, and should be the starting point for helping workers, members and activists understand their position relative to everything else. Indeed, in order to understand their own position in the process of production, workers need to recognise themselves their own interests and shared experiences, and be initiated into the wider context of other workers around the world (Freire, 1970). In the words of Stanford (2015:236), 'this is not just for the purpose of allowing the learners to more readily apply their education in subsequent activism, but indeed may be an essential psychological ingredient in the cognitive learning process itself'. Accordingly, stage one of our framework is the process of 'Framing'. Framing is central to the process of collectivism (Kelly, 1998) and to the ways in which union activists generate 'interpretative frames that legitimate action against employers' (Heery and Conley,

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2007: 13). However, the authors also go beyond Kelly's use of framing to highlight the ways in which 'framing can also occur within unions and be directed against union tradition and established leaders and interests' (Heery and Conley, 2007: 13) in order to promote dialogical change and debate inside unions (see Foley, 2003). We thus use framing to build upon Freire's concept of pedagogical development *with* and not *for* trade unionists, which is therefore critical, reflexive and emancipatory. This kind of approach is 'a process that takes place in a participation framework, not in an individual mind' (Hanks, 1991:5), and thus goes beyond a process of basic information exchange and training towards one of empowerment. In this context, framing should help one of the perennial problems of international trade unionism that is 'lack of mutual comprehension' (Hyman, 2005: 139) of union purpose (see also Hodder and Edwards, 2015).

Stage two is the process of synthesizing. This is about considering appropriate approaches and methods for bringing together knowledge from different union contexts and situations and ultimately generating new knowledge. Central to this is listening to developing situations across all levels of internationalism (Ramsay, 1997) as they are raised by members and activists inside the organisation (both horizontally and vertically), as well as sensing changing conditions in the external environment. This can be said to be a form of 'information management' (Ramsay, 1997: 521). This part of the process acknowledges what is not known by learners and activists, in keeping with the reflective nature of our framework, with the aim being to synthesise existing knowledge from these contexts. Indeed, 'without dialogue there is no communication and without communication there can be no true education' (Freire, 1970:65). This stage can benefit from both codified and non-codified knowledge. However, it is important to note that if too much information is codified, it can present three problems. First, a prescriptive set of tactics on how to approach certain issues, whilst useful in some circumstances, may be ignored or misconstrued. Second, the possibility of management access to knowledge is increased once it has been codified and international bodies need to be wary of leaks through the perils of partnership, works councils or yellow unionism. Third, issues of language and translation need to be addressed to ensure the way in which issues are understood across borders depends on accurate translation and depends on shared understanding of meaning (Cassell and Lee, 2016). In any case, the synthesis of knowledge in a union context tends to be evolving and tacit.

Connecting involves bringing together unconnected actors through both horizontal and vertical dynamics where issues of coordination and mediation come into play, and is stage three of our framework. It is crucial for understandings of the multi-level nature of international unionism to be garnered and bridged, which take into account the institutional, structural and agency challenges of cross-border action and international labour solidarity across the Global-Local dichotomy and the North-South divide (Salt et al, 2000). Central to all of this is the issue of communication across national boundaries and between different levels of organisation, which is crucial in developing a coherent approach to international unionism. Networks and other avenues of communication and information exchange have been shown to be beneficial in developing cross-border activities (Erne, 2008; Hyman, 2005: 150). However, although the processes of communication have vastly improved in recent years, issues still remain and it should no longer be considered as the saviour to the problems of international unionism (see Geelan and Hodder, 2017). Whilst the Internet has greatly increased the opportunities for communication through email and social media, research in this area suggests that unions have much to do to utilise the full potential of two-way participatory exchange that can be harnessed for learning (Martinez Lucio et al, 2009; Hodder and Houghton, 2015). Nevertheless, channels of communication are vital to help international union institutions become 'less like bureaucracies and more like network organisations' (Hyman, 2002:11-12) and assist in this stage of connecting. By engaging in learning in this way, it is envisaged that workers (union members) would be able to feel part of a community of practice (with the definition of community in this context being centred on common interests, rather than place). Workers are 'thrown together as a community because of their 'practice' and need to make sense of their role and their activity or their experience' (Ball, 2003:301). Global unions would then be able to then engage with members across geographic boundaries, building social capital to move away from a global 'union of strangers' (Jarley, 2005:6).

The final stage is that of regenerating. This is essentially the feedback mechanism and outcome of the above processes evident in both formal and informal practices of evaluation and monitoring. It is about maintaining the process of changing mentalities and attitudes whereby actors develop reflexive capacities and are therefore able to shape the process of framing. Although the framework has been presented as a step process, it should be noted that we are not prescriptive in the way it is utilised - unions may or may not follow each stage in a linear way, and stages may overlap/take place simultaneously. Thus, the regenerating

stage is particularly important in understanding union operations, as any kind of organisational learning needs to be reflexive and open to evaluation and modification over time, and sustaining this process of knowledge development and progress can help 'set the "tone" of trade unionism in the future' (Simms, 2007:127).

Below, we further exemplify our framework by unfolding each stage in relation to the pedagogical work of the International Transport Workers' Federation (ITF).

Background and justification

We use the work of the ITF for elaborating on our framework as it represents workers' interests in one of the most (if not *the* most) globalised sector. The bulk of their representation work is in civil aviation and maritime industries both of which are characterised by global and regional employer alliances and other interest groups, mobile workforces as well as global logistics and freight supply chains. The proliferation of international regulation since the mid-1900s has not put an end to violations and conflicts. This can be largely explained by the complexity and enforceability of regulation, the way it is interpreted at the local levels as well as transport industry developments (e.g. technological advances that in many occasions render such regulation obsolete). Focusing on ITF is thus interesting for two reasons. Not only do they use a variety of cross-border actions to address the limitations of international and national regulatory frameworks, but they also place a growing focus on education as a tool for emancipation and awareness of how the different segments of the transport sector offer platforms for labour leverage. Coupled with the proliferation of often contradicting interests, different identities and cultures that become even more prominent in a highly globalised sector, complex regulation and industry arrangements make ITF's education work a challenging process.

We therefore present the ITF as a *critical case* for exploring the relevance of our framework and consider it further in terms of its applicability. To be clear, we draw on the educational programmes of the ITF to explicate the framework, and not to evaluate the educational work of the ITF or showcase it as an example of best practice. We consider the ITF a '*favourable as possible…*'*locale*' (Goldthorpe et al., 1968:2) for the examination of our argument that global union pedagogy (as defined in our framework) could address the pitfalls of cross-border action. There are two reasons for this. First, education has been traditionally high on

the ITF's agenda and, as we will see later on, it aspires to evolve into a 'learning organisation'. Therefore, if education fails to enhance cross-border action in the case of the ITF then there are good chances that it will fail to deliver its objectives when used by other GUFs who may not prioritise education. Second, by demonstrating the value of our framework for GUF education work in the transport sector, we can then apply any lessons learned to GUFs' work in other globalized industries (e.g. financial services and apparel industries) that face similar issues.

We draw on and make reference to extensive primary and secondary documentation on the ITF's education and training practices and outcomes. Documents include learning programmes for members, 'training the trainer' programmes, organising guides and manuals, 'factsheets' for trainers and members on key issues (organising, GVCs, environmental and other matters, specific industries –civil aviation, maritime, logistics etc), and monitoring reports from external training providers. Documentary evidence was supplemented with expert interviews with education officials. The interviews were designed in a semi-structured format in order to get both factual information on the choice and impact of the learning approach, methods and materials as well as an assessment of the challenges of tailoring education programmes to specific cross-border initiatives and campaigns. Data were analysed thematically (King, 1998). We first coded data along the themes identified in the literature on cross-border action (for example, institutional and structural influences, use of agency & inter-union conflicts, relationship between union levels & structures, trade union openness to different strategies and path dependencies, access to resources) and then we further processed the data along the dimensions of our framework (i.e. framing, synthesizing, connecting, and regenerating). We also looked for relationships between the two sets of codes (for instance, we found that framing is shaped by a combination of agency and structural influences, that is, differences in union perspectives on education, and the relevance of the educational content to the GUF strategy department respectively).

Educational programs of the ITF

The ITF has 700 affiliated trade unions representing over 4.5 million transport workers from 150 countries. It has a regional as well as sectoral governance structure. The sectors represented by the ITF include seafarers, dockers, civil aviation, railways, road transport, urban transport, fisheries, tourism, and inland navigation. The ITF activity is centred around

three key dimensions: representation of transport workers in international bodies such as the International Labour Organisation (ILO), the International Maritime Organisation (IMO) and the International Civil Aviation Organisation (ICAO); solidarity action comprising (but not limited to) protest messages, demonstrations and political pressure, direct industrial action in the form of strikes, boycotts and other campaigns including the Flag of Convenience (FoC); information and advice on industry advances and union leadership development coordinated by the ITF's education department.

Education is part of ITF's cross-sectoral work which also consists of supply chain and logistics, women, young workers, climate change and HIV/AIDS. The ITF considers education imperative to union organising and cross-border action and, as emphasized by key education officials, this is why education is an organisational function well-resourced both in terms of financial and human capital. The GUF's education department has recently changed from a highly centralised into a decentralised structure as a way to reflect the union's regional and sectoral governance and to ensure that the education programmes are closely aligned to the political and industrial priorities of the organisation. Education officers were only London-based before the restructuring, whereas now the ITF has moved to a structure with regional officers (at least one from each region, Africa, Arab world, Asia Pacific, Americas, and Europe), section officers (at least one from each industrial sector) and education officers in key priority areas (HIV, youth programmes, supply chain & logistics organising, and maritime training & union development). The restructuring was deemed integral to facilitating systematic and frequent information exchange as there are now monthly global meetings were officers report the outcomes of their regional and sectional education meetings.

"ITF long-term education objectives aim to:

Build an awareness amongst union leaders and members of the importance of international solidarity and organisation in the context of globalisation;
Promote the development of a critical analysis of and response to transport restructuring;
Support and strengthen trade union organising and campaigning;
Strengthen policy, organisation and union strategy at a subregional and regional level in order to respond effectively to regional/subregional economic integration and policy making;

Build the participation and voice of women workers and other marginalized transport workers in ITF affiliates and structures".

Conrow and Banks, n.d., p.2

ITF education programmes are usually conducted on a regional and sub-regional basis with some follow-up work at the national level. London-based global workshops and training activities are rare largely due to issues of resources and logistics (e.g. visas of participants, travel expenses, language requirements). Programmes are sector-specific tailored to changes in different industries but they can also relate to a specific issue (for instance, climate change and HIV). The ITF's pedagogy is based on strategic research which informs ALMs where reflection and action are integral to achieving desired outcomes. Their approach is learner-centred and the ultimate aim is to enable participants to become aware of their own knowledge but also to enrich that knowledge by learning from their fellow participants. For the ITF, the aim of education is two-fold: (a) raising awareness and developing a critical consciousness of the issues at stake (for instance, helping affiliates understand what a workplace problem is) and (b) building the skills and capacity for engaging in different areas namely workplace representation, organising and cross-border campaigns (for example, skill-building in conducting industry research). Education programmes have formal objectives and success indicators, but in many occasions education seems to be an informal ongoing process.

'How can we make a problem more widely felt?

How can we make a problem more deeply felt?

How can we make a problem more "winnable"?'

Workplace Problems, ppt, ITF Training Materials

'What do we know about the industry?

Who are the main competitors?
How does the employer fit into the global supply chain? Are there key hubs or transport operators that the employer is sensitive to?
How does the employer or decision-maker compare with others in the industry?'

Industry Research, ppt, ITF Training Materials

Pedagogy in action

Framing

The challenges of the internal and external contexts and the complex interactions between the two render framing an arduous process. For the ITF, it seems that framing is the process by which decisions on strategies and hence pedagogical priorities are taken. In turn, these decisions inform the selection of the content of education projects and activities. Usually education needs are linked to the objectives of the industrial sections of ITF which may include, for example, union organising along logistics' value chains or understanding how technological and regulatory developments in the airline industry affect the workplace and worker rights. However, reaching consensus on the content of education is not always straightforward. Decision-making often depends on the relationship between the education departments and the strategy department, and on external dynamics between the ITF and national affiliates. Internal dynamics are shaped by the different perceptions on the importance of education among different sections of the ITF. As emphasized by the interviewees, those with the authority to make education decisions do not really come from an education background. The education team makes a recommendation and the political decision is ultimately made by the strategy team. However, this system has proved to be efficient and so far no recommendations have been turned down.

External dynamics are shaped by differences in the urgency ascribed to different issues by the ITF and local affiliates. As described by the ITF, they are in the position to sense when and how a particular issue is about to become a "trend" for unions in a way that affiliates cannot yet see in their own individual, national context. For example, HIV awareness and climate change are not always considered relevant among affiliates who are engaged in difficult local battles on organising and improving employment terms and conditions:

"Initially there was reluctance. Is [HIV] a private issue? Is it a workplace issue? There was a little bit of resistance. … We've seen the same with climate change. … We're in the transport industry, almost 100% dependent on oil … there's an acceptance [now] that there's a need for unions to have some sort of capacity to respond" (General Education Officer)

Framing is also shaped by differences between the Global North and the Global South in terms of how unions perceive and hence practice education. According to the ITF's experience, trade unions in the Global North and particularly in Europe have education departments with a strong focus on workplace representation skills but training on skills is

not always in alignment with political and industrial priorities. The declining levels of membership have given rise to the need to build strong organising and campaigning skills to deal with very anti-union companies. This has meant that the industrial and political aspect does not get as much attention as it should: "you can't do the skills without having an understanding of what's going on within your industry and then linking the two… That's one of the challenges" (General Education Officer). Conversely, there seems to be far greater appreciation of what education means for addressing contemporary workplace challenges among unions in the Global South. There is a political and ideological element to union education particularly in Africa and Latin America where a lot of education focuses on how globalisation impacted workplaces 'on the ground' and what that meant for unions in terms of membership. ITF attempts to address this challenge include participatory planning workshops where ITF educators listen to affiliates' concerns and hence ensure that education projects are based on local needs. However, ad-hoc bottom-up requests for tailored education programmes are not generally accommodated due to limited resources and the fact that the ITF works within the framework of projects.

Synthesizing

Synthesizing is about using the appropriate approach and methods for putting together knowledge from different union contexts and situations and ultimately generating new knowledge. As mentioned earlier, the ITF ascribes to the ALMs' tradition which perceives as the most relevant to trade union education:

"It's all about how people recognise who should have a voice and how people participate in decision making and how you equip people to participate in the organisations, and surely education has to be … not just [about] the level of awareness but also the process that you take people through, because it builds their confidence" (Supply Chain Education Officer).

The content determines the method and the level of the education programme. Methods are based on a combination of traditional presentations and participatory, reflective activities. When a new topic is introduced, the programme starts with a formal lecture on what it is and why it is important. Activities are then aimed at creating spaces where people can reflect and collectively learn from one another. Educators are encouraged by the ITF to work with union leaders prior to the sessions in order to build real examples into the programme (e.g. on organising). Moreover, real case-studies of campaigns based on strategic research are

provided by affiliates and included into formal education manuals. Although ITF education work seems to be largely top-down particularly with regards to content, there is some evidence on encouraging bottom-up approaches with regards to methods. The GUF encourages local affiliates to share their stories and strategies on organizing and worker participation, and assists with translation, writing, editing and educational forums.

The ITF is fully aware that people learn in different ways and therefore employs a range of learning methods including one-to-one techniques, small groups, mentoring, industry or educational events, surveys, social and union events. The aim is to involve and engage different audiences: union members and activists, union staff, elected union leaders and non-union workers, union decision-makers and organisers. Of the different methods, three are particularly relevant to synthesizing: one-to-one, small groups and surveys. Regarding the first one, the idea is that workers may be more likely to share experiences on a one-to-one basis instead of committing to a formal union activity which involves producing written materials. Education in small groups is part of strengthening ITF's worker networks:

"Small group meetings can take place in workers' homes, cafes or other safe locations. The meetings should be fun and build the sense of the collective. They should be a safe place to share questions. The small groups can either be informal and social or be run with an agenda (as in a study circle)" ('Training', ITF Training Materials, n.d., p. 93).

Worker networks are then used in GUF surveys for gathering relevant data that are then fed into wider education programmes and campaigns. Survey topics usually include knowledge of laws and regulations covering working conditions or information about specific conditions or problems.

Educators (both at the national and international levels) are called 'facilitators' and almost all of them have taken the ITF 'training the trainer' course. There are ITF guides available to facilitators in the form of 'factsheets' and 'manuals'. Factsheets assume that facilitators have knowledge on trade union education but may lack sufficient information on specific content (such as industry developments, climate change etc). Materials are intentionally generic allowing for adaptation and tailoring to local workplace needs or the needs of a specific campaign. Facilitators are not expected to know everything but their role is to provide resources and access to relevant information. They are encouraged to say 'I don't know'

where that is the case and acknowledge that both they and their group are beginning to explore the topic: "You just need a sense of the whole subject, and to know where to go back and find out more on a topic" (ITF Training Materials Factsheet 24, p. 1)

A further illustration of the synthesizing process is ongoing attempts to move from big, general education meetings to more specific action-oriented campaign-based programmes. This shift reflects the rather recent launch of the GUF's supply chain department (in 2013) where education is used to build relationships between workers in different parts of the chain involving more than once countries and industries, and sometimes more than one supply chains.

Synthesizing works by making participants exchanging knowledge and experiences of different parts of the chain(s) thereby together generating new knowledge on value chain leverage points and sources of labour power. For example, education programmes on the DHL campaign help participants draw the links between workers contracted by BMW and DHL direct workers and sense how they can use those links for protecting their rights and advancing their position along the chain(s). Such programmes were based on strategic research on the horizontal and vertical parts and connections of the DHL supply chain. The outcomes of strategic research were fed into 'multi-faceted' types of campaigns that involve multiple pressure points. Horizontal leverage included, for instance, manifestations of solidarity from DHL unions in different countries. Vertical leverage entailed targeting DHL global customers, not just those linked with the operations under scrutiny and making the links with unions in customer companies such as Auto, Ford, Food, Unilever, Nestle etc. In the words of our interviewees:

"It's very important in our work … to have those concrete experiences that people can refer to and adapt, because otherwise then it's very distant and you have a few people here who's grasping it, but the majority will just say, 'Okay you know this is something that their head office is thinking about', because [regarding] the supply chain work, it's still a process of learning and not many people within the organisation actually understand fully this concept and ideas and how they could use them" (Supply Chain Education officer).

A step towards helping participants apply new concepts and ideas is the use of simulation. Below we present an example of an exercise where learners are asked to develop a strategic campaign:

"By the end of this workshop, you will:

Have had some fun!

Have applied through a practical example the putting together of a strategic campaign including: direct and indirect targets, establishing a goal, identifying and utilising allies and employing strategies and tactics.

You are allocated to a campaign team.

As a campaign team your job is to assist a union in South Africa to win a bitter local dispute against the logistics provider, European Logistics[1].

You will be given an introductory brief shortly

You will have a total of 10 mins to digest the introductory brief

You will then receive a call from the ITF. New information is available to your team and will be provided. Your team has a total of 20 mins to take in the new information and use it to develop your campaign

In total there will be three interventions

Each team will be asked to report back"

Organising Globally, *The Strategic Campaign Game, n.d., ITF Training Materials*

Connecting

Connecting involves bringing together unconnected actors through vertical –and we would add horizontal- dynamics where issues of coordination and mediation come into play. For the ITF, connecting seems to work through learning as a "collective responsibility" able to endure structural, cultural and ideological differences between and within affiliate unions. Overcoming such differences can be facilitated by informal, horizontal interactions:

"the unions that are affiliated just have such different histories, traditions, structures. Some of them have a very active education programme, [they] have a learning culture …, but that's one end of the spectrum and at the other end of the spectrum there's nothing at all and then there's a lot of things in between. But what we've tried to do for a long time …, is to really, through a kind of informal networking approach, work together with the educators in our

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[1] The name has been changed to ensure anonymity.

affiliates. We've tried to reduce the structure from being vertical … to creating the networks so that there is some sharing of learning, ideas, methodology between educators that act at a more horizontal level" (General Education Officer).

Connecting though is not merely about coordination and mediation, but more so about getting the message across by making actors understand that they face the same challenges while sharing similar interests. Therefore, it is essentially about being able to make sense of new concepts, developments and strategies. Port education programmes are indicative of this process as traditionally the ITF has relied on dock workers to provide leverage by blocking services on the chain as an expression of solidarity to other sections of the ITF that might be on strike etc. However, with mechanisation that strength is declining and, therefore, part of the GUF's new strategy is to build a more coordinated approach by making linkages between workers within the port because they have largely worked separately even though they are in the same union. There is an education programme to support this work and it includes building an understanding of not only how the port operates but also some of the key supply chains and industries around it. In that respect, the ITF is increasingly focusing its education efforts on the oil and gas chain as it is not only relevant to the 'traditional' transport sectors that are linked to the port but it also relevant to aviation and road rail.

Yet, there are challenges to the process of connecting largely in terms of language barriers, differences in skill levels as well as mentalities. Education materials are available in multiple languages while efforts are made for implementing regional and sub-regional programmes with some follow up at the national and local levels instead of global meetings and workshops. After a trial and error period regarding translation of specific key terms in different languages, the ITF has adopted a formula of using external professional translators for their education materials followed by sending the final drafts to national educators to review and check for any misinterpretations. Regarding skill levels, 'training the trainer' programmes are used to recruit and educate facilitators. The aim is two-fold: to fill the gaps where education is notably absent and to challenge outdated perceptions of education. Regarding the latter, in many occasions education is viewed as a box-ticking bureaucratic exercise aimed at senior officials. Differences in mentalities also impact on the selection of participants which is in turn important for the process of connecting:

"Sometimes we very clearly define who the target group is which is good educational practice. It's very hard to often achieve that when you're working through affiliated unions because sometimes the General Secretary is deciding to reward someone who has been loyal and give them a trip somewhere and they don't fit the target group..." (General Education Officer).

Regenerating

Regenerating is essentially the outcome of the above processes. It is about changing mentalities and attitudes whereby actors develop reflexive capacities and are therefore able to shape the process of framing. Given that the ITF education work has a strong political element aimed at raising 'critical awareness', the question here is how education outcomes can be measured. In other words, to what extent do education programmes deliver on their stated objectives? Here issues of evaluation and monitoring come into play as the prerequisite for regeneration. ITF programmes have formal success indicators. There is an 'evaluation workshop' at the end and sometimes half way through the projects. Moreover, facilitators are encouraged to take evaluations from participants at the end of each session. However, informal feedback is also provided by participants at the end of each activity which is in turn used by the educators to reflect on outcomes.

Overall, regenerating is ongoing taking place gradually through informal processes of learning whose outcomes are difficult to measure. In the words of the ITF Supply Chain Education Officer:

"We still find that it's amazing to see on some of the education programmes, people who stand up and do a report back from their small group and they get really, really nervous because this is the first time they've ever had an opportunity to stand up in front of a room of people".

Two issues are important for the regeneration phase: empowerment of national and local actors and collective production of knowledge. For example, with regards to the first, one of the objectives of the 'training the trainer' course is that participants leave the course feeling that they have the skills to adapt ITF learning materials to different contexts and situations:
"For me education's got to be about empowering … and I don't feel that ITF's education role is to go out there and convince unions that the decisions we're taking are the right decisions"

(General Education Officer). Empowerment is viewed as the key to successful cross-border action:

"There are different levels of benchmarking and also levels of education, training and understanding [required] before you go public with your campaign … before you proceed to a particular action" (General Education Officer).

The ITF aspires to move towards the direction of a 'learning organisation' where actors learn collectively from one another but, in their own words, they are not there yet. Besides other challenges mentioned earlier (structural, political) there is also the issue of resources which renders evaluation difficult and sometimes impossible. Externally funded projects have their own evaluators who are paid to assess programmes by collecting data through conducting in-depth interviews and surveys. However, all other projects suffer from the lack of detailed assessments: "It's harder to monitor when you're working at an international level. So, I still don't feel that we've got that right... When you don't have [resources], it's just totally beyond our capacity to do that kind of in-depth evaluation" (General Education Officer).

Discussion and Conclusion

Our paper set out to examine the potential of global trade union pedagogy to enhance cross-border action by specifically looking at (i) the role of different actors in designing and receiving the pedagogy curriculum, and (ii) the role of GUF education strategies in addressing the different structural and political challenges of global campaigns. Regarding our first objective, we find that different configurations of actors both impact and are impacted by the curriculum in different ways. At the global level, we see that relationships between different sections of GUFs (i.e. strategy and education divisions) shape pedagogical priorities and hence the content of education programmes. Differences in dynamics between GUFs and national affiliates determine how the curriculum is received on the ground, and it is the role of GUFs to clearly communicate the relevance of a particular education programme for local contexts. However, on the ground, the challenges lie in ensuring real engagement with the process that is not tokenistic at all levels, and the need to reach beyond the senior official level and involve different sections of local trade union movements in the education process. An additional challenge is to design curricula that accommodate differences in the meaning of education for different local unions. Thus, there will inevitably be difficulties in ensuring that unions fully engage with the concept of learning. By placing
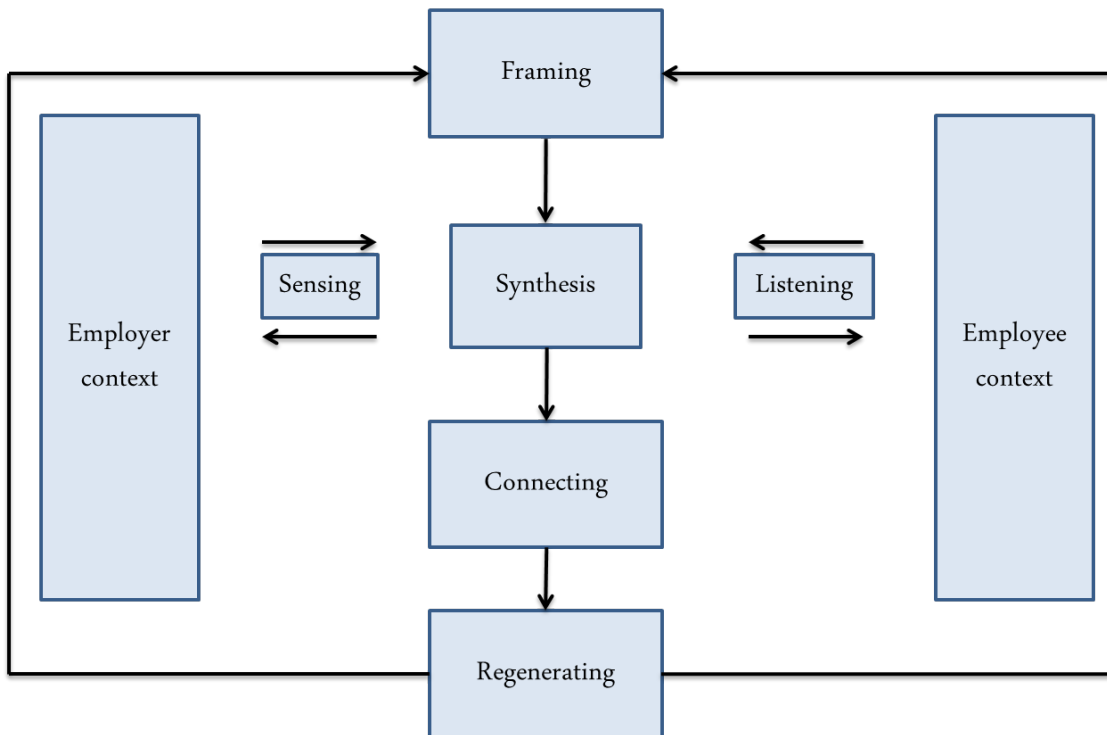
learning at the heart of the renewal and revitalisation agenda as a core strategic capability (Levesque and Murray, 2010), it is anticipated that this will go some way to ensuring that its adoption does not become tokenistic, disconnected and symbolic (Hyman, 2005; Ramsay, 1997). However, we recognise the potential for the dilution and transmutation of ideas (Cassell and Lee, 2016) and acknowledge that commitment to strategies for renewal are not straightforward or deterministic (Simms et al, 2013).

Regarding our second objective, we find that the processes of framing and connecting are useful for addressing structural and institutional challenges of cross-border activism. Both processes are imperative to overcoming language barriers, differences in levels of skills and the role of path dependency. Going back to the Global-Local dichotomy and the North-South divide, we find that they are 'true' only when they are treated as such. For instance, the Global North focuses on specific skills while the Global South focuses on surviving the effects of globalising industries at the workplace level. Similarly, global unions are concerned with wider societal issues while local unions prioritise shop-floor conflicts. A framework on union education that accommodates top-down, bottom-up and horizontal processes of collecting knowledge from different contexts and making linkages between different countries, industries and parts of supply chains helps actors connect the dots and realise that their seemingly very diverse concerns are essentially different aspects of the same problem. Such an approach generates both holistic education programmes as well as tailored ones to specific campaigns or local situations. We can also see that the political and agency-related challenges of cross-border campaigns can be largely addressed during the synthesising and regenerating processes. These processes are ongoing and reflective with empowerment and collective production of knowledge as their key objectives. Both objectives can be achieved through the combination of formal and informal pedagogical practices that create 'safe' environments where participants evaluate programmes, raise issues and work together thereby minimising ideological distances. Yet, we find that the availability and allocation of resources has a major impact on encouraging bottom-up responses and conducting in-depth assessments of activists' needs and agendas.

Conceptually, the strength of our framework is that it borrows from industrial relations, political sociology and education in order to explain pedagogic processes and outcomes as responses to the pitfalls of global labour activism. By drawing on the ITF as a *critical case*, we can attest to the analytical value of our framework. Our study of the various elements of

an existing global education strategy shows that actor-centred pedagogic praxis that makes references to different levels and contexts is integral to any form of successful cross-border activism. However, coordinating differences across levels and contexts should constitute only one dimension of GUF education strategies. The latter may need to 'recreate the meaning of solidarity by reverting to common touchstones within the labour movement … such as class and mobilization based discourses that can cement links across competing regulatory spaces' (Lillie and Martinez Lucio, 2012:89). From a policy perspective, our framework could inform activist agendas on creating global union networks, adopting agreements with MNCs and organising along supply chains among other initiatives. Yet, we believe it should be further examined in different GUF, industry and regional settings. Obviously, to test such a framework is not without challenge. We therefore call for comparative mixed-method designs and inter-disciplinary approaches to the study of the role of pedagogy in international unionism, incorporating insights from education, economic geography, politics and development studies.

Figure 1

Framing

Sensing

Synthesis

Listening

Employer context

Employee context

Connecting

Regenerating

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